Merlinia OutBack

OutBack Client User Guide

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Merlinia OutBack

OutBack Client User Guide

by Merlinia A/S

Merlinia OutBack is a presence management system that integrates with a number of telephony system as well as Microsoft Exchange and IBM Lotus Notes.

In this user manual it is explained how the Merlinia OutBack Client works.

This manual is available both as a ready-to-print pdf file (this document) and as an online Help file.

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I Welcome to Merlinia OutBack

Welcome to Merlinia OutBack - the most innovative and easy-to-use in/out board and information center program for you and your company.

Merlinia OutBack combines the power of in/out status, calendar overview, an information center (phone numbers, e-mail addresses, etc), and full telephone integration in a simple yet flexible application.

Nomenclature

A few typographical conventions to be aware of, when reading through this help, include the following:

- Menu items are always separated with a vertical line to denote the menus and sub-menus you need to open. For example:

  Options | On Startup | Hide OutBack on Startup

  This means that you should click the **Options** menu item to open it, then select the menu item **On Startup** to display its submenu, then finally select the submenu item **Hide OutBack on Startup**. Note that some menu items work as toggle buttons, e.g. the above example toggles between whether OutBack will start minimized (shown as an icon in the notification area of the taskbar) or not. The active condition is shown with a check mark next to the menu item. Menu items like this are especially common in the **Options** menu.
- Whenever a word or a sentence refers to a control in OutBack itself, e.g. a button, a menu item or an edit field, it will be stated in bold. For example, "press the **OK** button" or "select the **Name** edit box".
- File names and paths are stated in italics, for example *C:\Windows*.
- Expressions or words that mention a feature in OutBack will be stated in italics, for example *calendar column*, sometimes even in italics bold, for example ***alerts*** or ***column groups***.
- All references and examples regarding dates and time of day will be given using the 24- hour system. However, OutBack works equally well with both the 12-hour AM/PM system and the 24-hour system. Which system is used depends on the regional settings of Windows.
- Notes - if we want to draw your attention to a special situation, we show that in the following way:

  > Be aware that a reboot might be required after completing this action.

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II Getting Started with Merlinia OutBack

The IT Department in your company should have installed OutBack so it starts automatically each time you start your PC. As soon as your OutBack is up and running, all other OutBack users can see that you have come online.

Don’t stop OutBack

The OutBack program is intended to be run all the time that your PC is running, so **please do not stop it**. OutBack uses minimal resources, which means that you can run the program without other programs slowing down.

If you don’t like OutBack taking up screen space then you can "minimize" OutBack, just like any other Windows program. This is done by clicking the minimize button on the title bar. It is also possible to hide OutBack so that it does not even show a button on the taskbar. This is done by simply clicking on the cross button in the top right corner. Now only a small icon is present in the system notification area. You can also make OutBack hide itself automatically - see **Options | On Startup**

Switching off the computer

When you want to switch off the computer (for example to go home), it is okay to either stop OutBack manually or merely shut down Windows as you are used to, without worrying about OutBack. Either way works fine with OutBack and it will also set the log off message if you have told it to do so. See **Options | On Log Off**

However, if OutBack is running on a *Terminal Server* or *Citrix* client, it is important that you **always log off in the Terminal Server window rather than just closing it**! If you merely close the Terminal Server window, OutBack will still be running thus everyone in the company might think you’re still available. (Alternatively, you can close OutBack before closing the Terminal Server window.)

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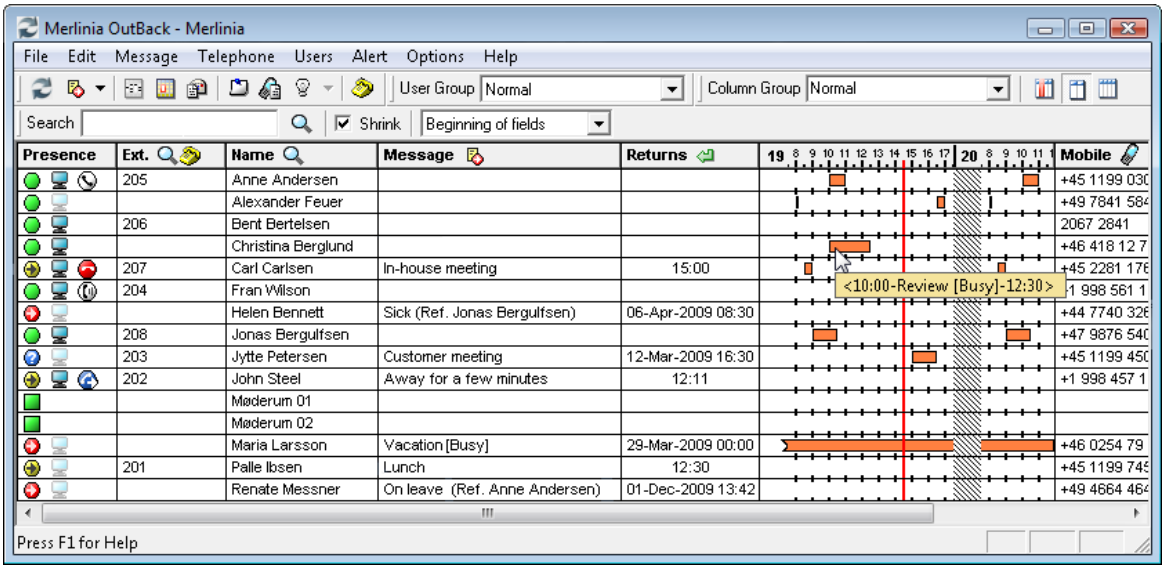
III The OutBack Main Window

Description of OutBack's Main Window
The Data Grid
Manipulating the Data Grid
Customizing the Appearance of the Data Grid

3.1 Description of OutBack's Main Window

Merlinia OutBack is an ordinary Windows program, and as such resembles most modern Windows-based programs.

The following picture shows the OutBack main window.



As can be seen, the OutBack main window consists primarily of a large data grid, similar to that found in a spreadsheet program such as Microsoft Excel. This data grid and other user interface elements are described in the following sections.

3.1.1 The Main Toolbar

This toolbar contains some of the functions most often used in OutBack:

The following is a description of the buttons on the main toolbar:

	Default OutBack Message - this button works exactly as if you pressed the specialized global **OutBack** key. It opens the **Set Message** dialog box with the message item selected that has been assigned to the **OutBack** key. If you don't touch the dialog box for 5 seconds, the message will then automatically be set. (See Setting a Message via the Global OutBack Key).
	Set, Clear or **New Message** - this context button will automatically display the most logical choice that can be selected regarding how the message should be handled. For example, if

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	you have no message in the data grid, the yellow note icon is shown to let you know that the **Set Message** dialog box will open when you press the button. If you have a message set, however, a green round icon will be shown. In this case the message will be cleared as soon as you press the button. You can also press the arrow button next to the icon to drop down a small menu with the following items to choose from: • **Set Message** (**F7**) • **Clear Message** (**F8**) • **New Message** (**Shift+F7**) If a hotkey has been assigned to a message, those messages will also appear on the menu. In this situation, you can set a message by either selecting it on this menu, or simply by hitting the appropriate hotkey. The **Set Message** dialog box is covered in OutBack Messages.
	Open Calendar - opens the Lotus Notes or Microsoft Outlook calendar for one or more selected users in the data grid, but only if you have permission to view the calendars of the selected users.
	Create New Appointment - opens an appointment form in Microsoft Outlook or Lotus Notes for one or more selected users in the data grid. This way, you can "invite" them to the appointment you are creating.
	Send E-mail - this item works much like menu item File | Send E-mail except it only works if the OutBack client has been integrated with Microsoft Outlook or Lotus Notes (see Options | Notes/Outlook Settings). It opens an e-mail window with the "To:" field showing the users you selected in the data grid.
	Send Notice - this sends an OutBack notice (a small message) to one or more selected users. See the menu item File | Send Notice.
	Send SMS - this button lets you send an SMS to a selected user. See File | Send SMS for more details.
	Set, Remove or **Remove All Alerts** - this context button will automatically display the most logical choice when dealing with ***alerts***. When you select one or more rows in the data grid where none of them has an ***alert***, the unlit light bulb icon is shown to let you know that you can now set one or more **alerts**. See Setting an 'Alert' for a User and Alert Menu for more information. If at least one of the selected rows already has an ***alert***, a crossed light bulb icon is shown to let you know that pressing the button will remove the ***alerts*** from the selected rows. If you haven't selected any rows in the data grid but there is at least one row with an ***alert***, an icon showing three small crossed bulbs is shown on the button. Pressing it will remove all ***alerts*** in the entire data grid.
	Display/Hide the CBS - shows or hides the Computer Based Switchboard (CBS) window. This functionality is only available if a PBX integration license has been purchased. Please see Supported PBXs. *Note that this button works as a toggle switch.*

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3.1.2 The Column Group Toolbar

The following is a description of the controls on this toolbar. For more information, see Column Groups.

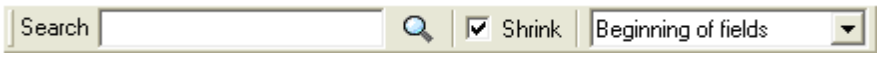
	Column Group drop-down box - this is where the available column groups are listed. Here you can select the column group, you want to be active.
	Edit Column Groups - press this button to open a dialog box where you can create, delete or edit column groups. See Managing Column Groups using the Dialog Box for more information.
	Show Column Group - press this button to show only the columns belonging to the currently active column group. *Note that this button works as a radio button.*
	Show All Columns - when pressed, all columns in OutBack are shown and the text in the drop-down box changes color. The same color will also be applied to all the column headers in the data grid that belongs to the active column group. *Note that this button works as a radio button.*

3.1.3 The User Group Toolbar

On the user groups toolbar you can select which category of users and / or resources, such as meeting rooms or projectors, you want to see in OutBack. For more information about resources see **Presence Column** the section Description of Selected Data Grid Columns or How the Elements of the 'Resources' Tab Work.

See the section Displaying OutBack Users According to Category for more information on categories and how to place users in them. See the **Users Menu** for more information on user groups.

3.1.4 The Search Toolbar



The powerful search toolbar makes it possible to search for virtually any information in the data grid in a fast and logical manner. The following is a description of the controls on this toolbar. See Searching the Data Grid for more information about the search capabilities of OutBack.

- **The search edit field** - this is where you type the search text. As soon as you type almost any letter or numerical key on the keyboard while you are in OutBack, you automatically enter and type in this box right away. The search function only searches in the columns selected under **Options | Search | Define Search Columns**.
- **Search button** - actually a redundant button since you can activate and perform a search completely without it. Still, it's there in case you have turned off dynamic update of the data grid in the OutBack options. Selecting it while the search edit field is empty will place the cursor in the edit field, ready for you to type the search text. If there is already text in the edit field, however, the search will be performed immediately as you press this button.

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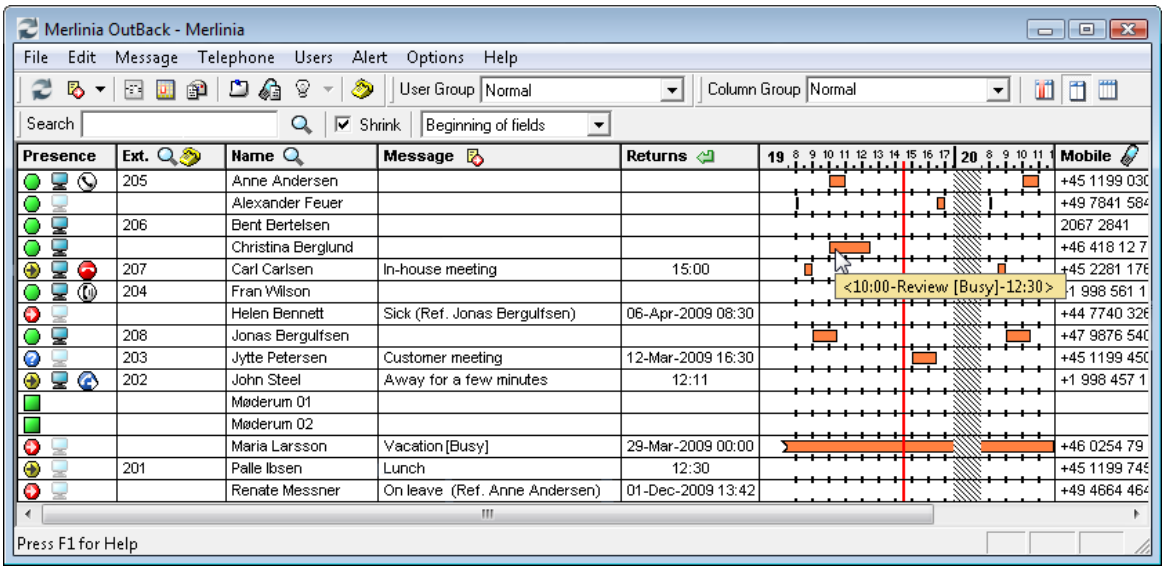
- **Shrink check box** - this check box will determine how you want the search result to be presented. When checked, the data grid shrinks to show only the rows relevant to the search text. If it is cleared, however, then the same search will just *select* the rows of the users so that you can still see the entire data grid. (In this mode **F3** will jump between the search results.)
- **Search method drop-down box** - this is where you choose how the search text is matched against the text in the data grid. There are four different search methods, all of which are described in greater detail in The Search Methods Available.

All OutBack toolbar buttons are capable of displaying "tool tips" which is shown when the mouse cursor is placed above one of the buttons. The "tool tip" will show a short description of the purpose of the button.

3.2 The Data Grid

The data grid is the most important feature of OutBack's main window. The data grid contains one row or line of information for each of the employees that have been added to the OutBack Server program. The information is organized into columns that can be manipulated by the user.

The following picture shows the OutBack client program window. As can be seen, the data grid occupies the majority of the window: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File Edit Message Telephone Users Alert Options Help
User Group Normal
Column Group Normal
Search
Shrink
Beginning of fields
Presence | Ext. | Name | Message | Returns | Mobile
205 Anne Andersen
Alexander Feuer
206 Bent Bertelsen
Christina Berglund
207 Carl Carlsen In-house meeting 15:00
204 Fran Wilson
Helen Bennett Sick (Ref. Jonas Bergulfsen) 06-Apr-2009 08:30
208 Jonas Bergulfsen
203 Jytte Petersen Customer meeting 12-Mar-2009 16:30
202 John Steel Away for a few minutes 12:11
Møderum 01
Møderum 02
Maria Larsson Vacation [Busy] 29-Mar-2009 00:00
201 Palle Ibsen Lunch 12:30
Renate Messner On leave (Ref. Anne Andersen) 01-Dec-2009 13:42
<10:00-Review [Busy]-12:30>
Press F1 for Help

The appearance of the data grid in the above picture may not necessarily look like your copy of OutBack. This is because it is possible to customize major parts of the appearance of OutBack. See Customizing the Appearance of the Data Grid for more information.

Note that only seven columns of data are visible in the above picture. However, if you look at the horizontal scroll bar you will see that there are a lot of columns of data associated with each user - but most of them cannot be seen until you scroll to the right.

3.2.1 Scrolling in the Data Grid

The most common way to scroll in the data grid is by using the mouse to drag the horizontal or vertical scroll bars. Almost as common, and just as fast in many circumstances, is use of the **Page Up** and **Page Down** keys and all four of the cursor keys. Finally, **Ctrl + Page Up** moves to the top of the data grid and **Ctrl + Page Down** moves to the bottom (you can also use **Ctrl + Home** and

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Ctrl + End to perform the same actions). **Home** moves to the start of a row, and **End** moves to the end.

If you have a wheel mouse, you can scroll the data grid with it. Scroll up and down using the wheel. Hold down **Shift** when using the wheel to scroll horizontally. Note that if all the user rows in the data grid can fit in the window, the mouse wheel will always scroll horizontally. Hold down **Ctrl** when using the wheel to zoom the data grid view. (In fact, this is the only way to zoom the data grid view).

3.2.2 Description of Selected Data Grid Columns

OutBack will typically display a large number of columns containing information about each user. The exact number of columns and the names of these columns depend on several things, including the way in which OutBack was installed by your IT Department and the storage system being used by the OutBack Server program. However, certain columns will always be available that are unique to OutBack itself. These columns will be described in the following sections.

Presence Column

This column displays at least one symbol that describes the "OutBack status" of each user or resource. This makes it easy to see at a glance whether a user or a resource is available or not.

Here is a quick explanation of all of the symbols that can be shown in the **Presence** column. The first symbols are only used in combination with users:

This green symbol means that this user does not have an active OutBack message, and is therefore available. A user can be available, i.e. not occupied with other tasks, although he or she is not logged on to a computer.

The online symbol is displayed whenever the user is logged on to his or her computer. This symbol is faded when the user is not running OutBack, which is typically the case when the user in question has turned off the PC

The yellow arrow symbol means that this user is not available but has posted an OutBack message stating he or she is available later the same day.

The red arrow symbol means that the user has posted an OutBack message and is not expected to be available again the same day.

The blue question mark indicates that Outback does not know when a user is expected to return. If the symbol is displayed for all users, it probably means that your OutBack Client program is unable to communicate with the OutBack Server program. Contact the IT Department if the problem does not clear up within a few minutes.

The data grid can also show resources, e.g. meeting rooms or video projectors, which can be reserved by the users when they set their message. The resources use the following symbols:

The green square means that the resource is available at the moment and can be reserved.

The yellow square means that the resource has been reserved at the moment, but will be available later during the day. Look at the message to determine who has reserved the resource.

The red square means that the resource has been reserved for, at least, the rest of the day. Look at the message to determine who has reserved the resource.

The blue square has the same meaning as the blue question mark symbol for users, only here you can see that the row belongs to a resource.

The above symbols are the "primary" symbols, and there is always at least one of them displayed

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for each user or resource. In addition to this, the following symbols may also be displayed in the **Presence** column, depending on the services provided by the company's phone system:

The unlit light bulb symbol indicates that you have set an ***alert*** on this row. See **Alert** menu for more information.

The lit light bulb symbol indicates that the ***alert*** that was set for this user or resource has been triggered. OutBack actually flashes by alternating between the unlit and the lit light bulb symbol. The symbol will also be shown instead of the OutBack symbol in the system notification area.

The phone icon indicates that a user's stationary phone is busy.

The alerting phone icon indicates that a user's stationary phone is ringing.

The blue phone icon indicates that a user's stationary phone is forwarded to another number.

The red phone icon indicates that a user's stationary phone is in do-not-disturb (DND) mode.

The cell phone icon indicates a user's mobile phone is turned on and idle.

The active cell phone icon indicates a user's mobile phone is busy.

The unavailable cell phone icon indicates a user's phone is turned off or otherwise out of coverage.

Name Column

This column shows the full name of the OutBack user or resource.

Updated Column

This column shows the date and time when this user last performed a **Set Message** or **Clear Message** operation, but it can also be an indication of when the user logged in (started the OutBack Client program) or logged out (stopped the OutBack Client program).

If the time stated refers to today, only the hour and minutes will be shown.

Returns Column

This column shows the date and time when the user expects to return. The data in this column is blank when the OutBack message is blank, indicating that the user is currently available.

If the date and time shown in this column have passed, then this can imply that the user is still away from his/her desk, and that he/she underestimated how long he/she would be away.

If the time stated refers to the current date, only the hour and minutes will be shown.

Message Column

This column contains the current OutBack message for each user. If the column is blank then this implies that the user is at his/her desk. When a message is set for a resource you will be able to see the name of the user that reserved the resource. The name is indicated in parenthesis after the message.

Location Column

This column *may* contain the current whereabouts of the user. It is possible to define and set your current location whenever you set or clear your message, but it is not required by OutBack. If the user makes use of this feature, it may provide information for everyone else using OutBack to see where the user is right now.

Current Phone Number Column

Just like the **Location** column, the user is free to decide whether they want to specify their current

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phone number whenever they set or clear their message. The column is supposed to specify the phone number that can be used at any time in order to get in touch with the user in question.

Log On # Column

This column shows the number of OutBack Client programs that this user has running simultaneously. This number will normally be 0 or 1, but OutBack does support the situation where the same user logs on to the network from multiple PC's at the same time and runs the OutBack Client program on all of them.

There are some special implications associated with being logged on to two or more PC's and running the OutBack Client on them simultaneously:

- If an OutBack user sends a ***notice*** to you, then this will appear on all of the PC's on which you are running the OutBack Client.
- If you set an OutBack message that opens a *message window* or activates a *screen saver*, then this will also happen on the other PCs on which you are running the OutBack Client.
- See under **Options | On Startup | Clear Message on Startup** for the implications for this option when you are running multiple copies of OutBack Client.

Group Column

This column displays which group a user belongs to, if any.

A user will have a status of "Ignored" if the menu item **Users | Ignore Users** has been applied to this user.

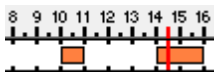
A user can also have a status of "Special 1" or "Special 2" if he/she has been placed in one of these two categories. This is done by using the menu items **Users | Special 1 Users** and **Users | Special 2 Users**.

If the **Group** column is empty then the user does not have an ignored status and is not in either of the special user categories.

Calendar Column

The most unique and specialized column of them all is the *calendar column*. This column show the current day and an adjustable number of days ahead, in which all the intervals of the day where a given user is busy are marked with a small "busy" block. The *calendar column* receives its information directly from OutBack Server and thus does not involve your local calendar program. All users or resources that have a calendar through Lotus Notes or Microsoft Outlook will be presented in this column. If you see a hatched bar for a given user, the user may not have a calendar program or he/she simply has not initialized it yet.

As an example, suppose you see the following for a user:



This indicates that the user is busy from 10:00 to 11:00, and again from 14:00 to 16:00. Time and date notation is locale dependant. The vertical red timeline shosw the current time of day.

In this example, the current time is now about 14:30, hence the users second meeting is currently in progress. However, this is exactly where OutBack shows its true powers. Take a look at the **Presence**, **Updated**, **Returns** and **Message** columns to see if he truly *is* busy. If he is available, it could be that the appointment has been cancelled or that it has been delayed. It is possible to set a message based on an appointment in the calendar. In this case the OutBack message and the appointment will of course always be identical. (For more information about *calendar messages*, you should refer to OutBack Messages.

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Open Calendar *toolbar button*

If you double-click a user row in the *calendar column*, and the user has given you permission to see his/her calendar, OutBack will open his/her calendar in a separate window. This is equivalent to selecting the row of the user and then pressing the **Open Calendar** toolbar button on the main toolbar.

The *calendar column* can be customized in a number of ways, both regarding the colors used and the time span you see for each day. If you want to define the colors of the calendar block and the time line, refer to **Options | Colors**. The time span of a day can be defined in the **Calendar Settings** dialog box. Please refer to **Options | Calendar Settings** for more information about this.

Other Columns

There are a large number of other columns (not directly related to OutBack itself) that are displayed for each user, such as **Phone Number**, **Department**, **Company**, **Fax Number**, etc. Most of these are fairly self-explanatory.

If you want more information about these additional columns you should talk to your IT department. These additional columns display data from the storage system used by the OutBack Server program (usually Microsoft Active Directory). The selection and contents of these columns are typically maintained by your company's IT department.

3.3 Manipulating the Data Grid

OutBack allows you to manipulate the data in the grid in many ways. Even though this is not something that many users will do very often, it is quite useful to know about how the grid can be manipulated as this can make it easier for the user to find the information he/she needs.

3.3.1 Selecting Rows and Columns

Selecting Rows in the Data Grid

Many OutBack features are based on the user first selecting one or more rows (lines) in the data grid and then invoking the function. For example:

- Sending a ***notice*** - see File | Send Notice.
- Setting an ***alert*** - see Alert Menu.
- Viewing the Microsoft Outlook or Lotus Notes calendar of other users - see File | Open Calendar.
- Ignoring (hiding) users - see Users | Ignore Users.
- Putting users in special categories - see Users | Special 1 Users.

Click anywhere on the row to select it. Multiple rows are selected by either dragging the mouse over the rows to be selected while holding down the left mouse button, by clicking a start row then holding **Shift** and click an end row, or one at a time while holding down **Ctrl**.

Consider sorting the data grid first. For example, if you want to select all of the employees that work for a certain department, then first sort the data grid by double-clicking the **Department** column so that all of the employees in each department are grouped together. Please note that available columns may vary depending on your company's configuration of OutBack.

Finally, you can select certain rows by searching for specific words in the data grid. Refer to Searching the Data Grid for more information about the search features in OutBack.

Hitting the **Esc** key cancels all row selections after searching.

Selecting Columns in the Data Grid

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Selecting grid columns is somewhat similar to selecting grid rows, except that you must click on the column headers with the mouse.

There are two OutBack features that are dependent on the selection of grid columns:

- You can rearrange the columns by selecting the column(s) you want to move and then "drag" the column header. See Rearranging the Columns.
- You can change which columns are members of ***column groups***. See Column Groups.

The same techniques can be used to select multiple columns as for selecting multiple rows, like dragging the mouse across multiple column headers while holding down the left mouse button. You can also use the **Shift** and **Ctrl** keys.

Selecting multiple non-adjacent columns is especially applicable to the situation where you want to e.g. add or remove columns in a ***column group***. Just go through all of the columns, selecting all of the ones that you want to change by clicking on the header while holding the **Ctrl** key down. Then right-click one of the selected columns and choose the ***column group*** item on the small menu you wish to toggle on or off - thereby indicating whether those columns should be a member of the ***column group*** or not. (Alternatively, you can also open a specific dialog box in which you can edit the ***column groups***. See Managing Column Groups using the Dialog Box for more information about this.)

Hitting the **Esc** key cancels all column selections. Hitting it one more time will reset the search functionality, i.e. clear the search field and re-activate all the ***search columns***.

3.3.2 Rearranging the Columns

You can rearrange the data grid columns so they are in the order that you want. It is recommended that you place the most important columns among the first six or seven columns. This way, you won't have to scroll to the right to see the information that is important to you.

In order to move a column you must first click once on the header of the column in order to select the column. While holding down the left mouse button, you now move the column by dragging its column header to the place where you want it to be (indicated with a red vertical line).

In order to cancel the column selection you can use the **Esc** key.

It is also possible to select multiple columns and then move them all at once. Just select two or more columns by moving the mouse over several column headers during the selection. (You can only move multiple columns if they are adjacent to each other.)

Note: If you want to move a column further to the right/left than you can see in the current window, you can use the **Left/Right** cursor keys to scroll the view while dragging the column.

3.3.3 Resizing the Columns

Columns can be resized to make their size suitable to the amount of data being displayed in the column.

In order to change the width of a column you must move the mouse cursor over the junction between two column headers. When the mouse cursor changes into a double-headed arrow, press the left mouse button down and hold it as you move the cursor to the left or right. As soon as the width is correct you can release the mouse button again.

Alternatively, if you double-click the mouse when the double-headed arrow cursor is shown, then OutBack will automatically resize the column to the left so that it is just the right size for the data

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being displayed.

3.3.4 Hiding and Unhiding Columns

OutBack normally displays a large number of columns of data, and you may decide that you prefer not to have all of them displayed. You may even want to have several groups of columns, for example a group consisting only of telephone numbers and another with addresses. All this can be achieved with ***column groups***. Refer to Column Groups for more information about this.

3.3.5 Sorting the Grid by Column(s)

You can sort the information in the OutBack data grid by the contents of one or more columns.

To sort the data grid according to the contents of a column you just double-click on the header for the column. This will sort the grid data by the contents of this column in *ascending* order. If you want to sort by this column in *descending* order, just double-click on the same header again.

If you want to sort the data grid according to the contents of several columns at once, like **Department** and then **Name**, this too is possible. See **Options | Sort Definitions**.

Sorting the data grid can be very useful when you want to group the users according to some criteria. For example, if you want to select all of the employees in a certain department, then first sort the data grid by the **Department** column.

Another reason for sorting the data grid can be to make it easier to find a user based on a known piece of information. For example, if you want to determine who has telephone number 555-2524 then just sort the data grid by the **Phone Number** column and then it is easy to find number 555-2524.

The Data Grid is Updated Dynamically

Whenever you have selected one or more columns to sort the data grid by, the changes applied to any of the lines shown in it will automatically re-sort the rows again to always keep a dynamically updated view. This way, you can safely sort the data grid according to e.g. the **Updated** column so that you can always see who has updated their OutBack status recently and who has not updated it for a long time.

3.4 Customizing the Appearance of the Data Grid

We all have different tastes. Some people like to have information presented to them in simple black and white tables full of numbers, while others prefer to see three-dimensional graphs in vivid colors.

Merlinia OutBack allows you to customize the appearance of the data grid. For example, you can specify whether or not you want to see the horizontal and vertical grid lines displayed. See **Options | View** for more information.

You can also specify the colors that OutBack uses to display the various parts of the data grid. See **Options | Colors** for information on which elements you can change the color.

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IV OutBack Messages

The 'Set Message' Dialog Box
The Simple Mode
The Advanced Mode
Setting a Message via the Global OutBack Key
Clearing the Current OutBack Message
Setting Messages via Cell Phones

4.1 The 'Set Message' Dialog Box

Setting an OutBack message is the way you inform other users that you are presently unavailable. When a new OutBack message is set the **Updated** and **Returns** columns in the data grid are modified, updating them to the time the message was set and the time when you expect to return. The **Presence** column is also updated, with the symbol being set to or , indicating that you have set a message. Setting a message mainly involves the **Set Message** dialog box and a predefined message when logging out. Setting your status and messages via a cell phone is possible if your company has configured OutBack to receive SMS messages.

We had one clear goal when designing the dialog box. We wanted to separate the daily use of the dialog box from the less frequent situation, where you create a new message or edit one of the existing messages. The most common situation, where you merely select a message, is called the *simple mode*, while the expanded version of the dialog box is called the *advanced mode*.

The Simple Mode

The daily use of the dialog box keeps it simple by hiding all the editing attributes. This is the mode you will see in most cases when you open the **Set Message** dialog box.

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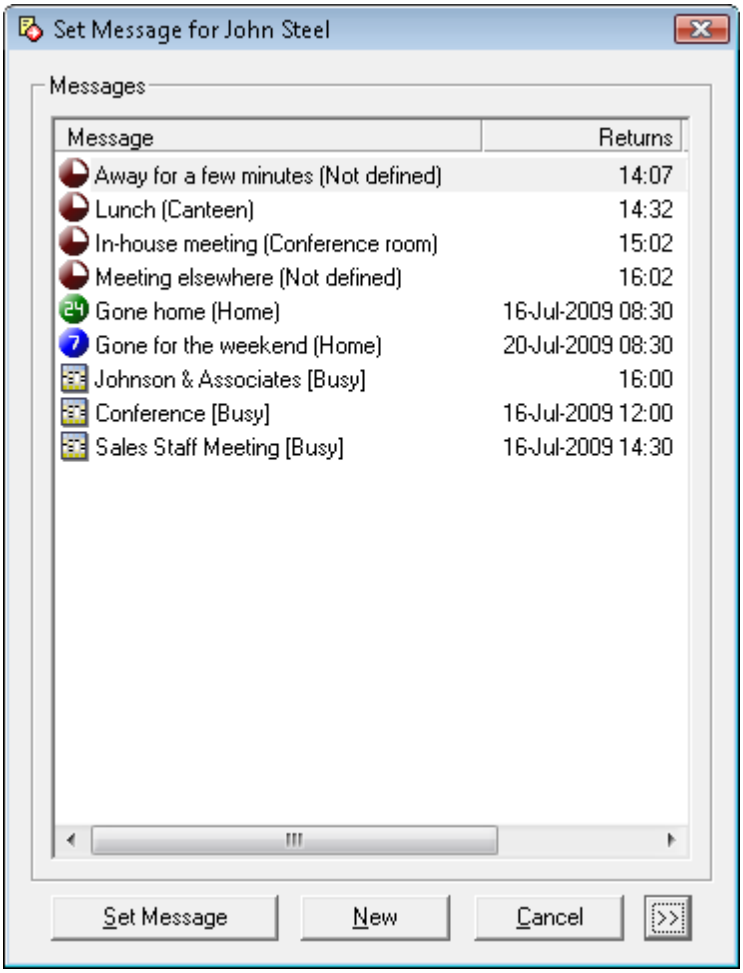

Because setting an existing message is what you will be doing most of the time, the first chapter will only discuss the use of the dialog box in this *simple mode*.

See Overview of the Dialog Box in Simple Mode.

The Advanced Mode

Whenever you feel the need to edit or create a message, the most common way of doing so is to expand the dialog box by pressing the **>>** button. This makes the dialog box twice as wide, opening up for a series of control boxes in which you can edit all the properties of a message.

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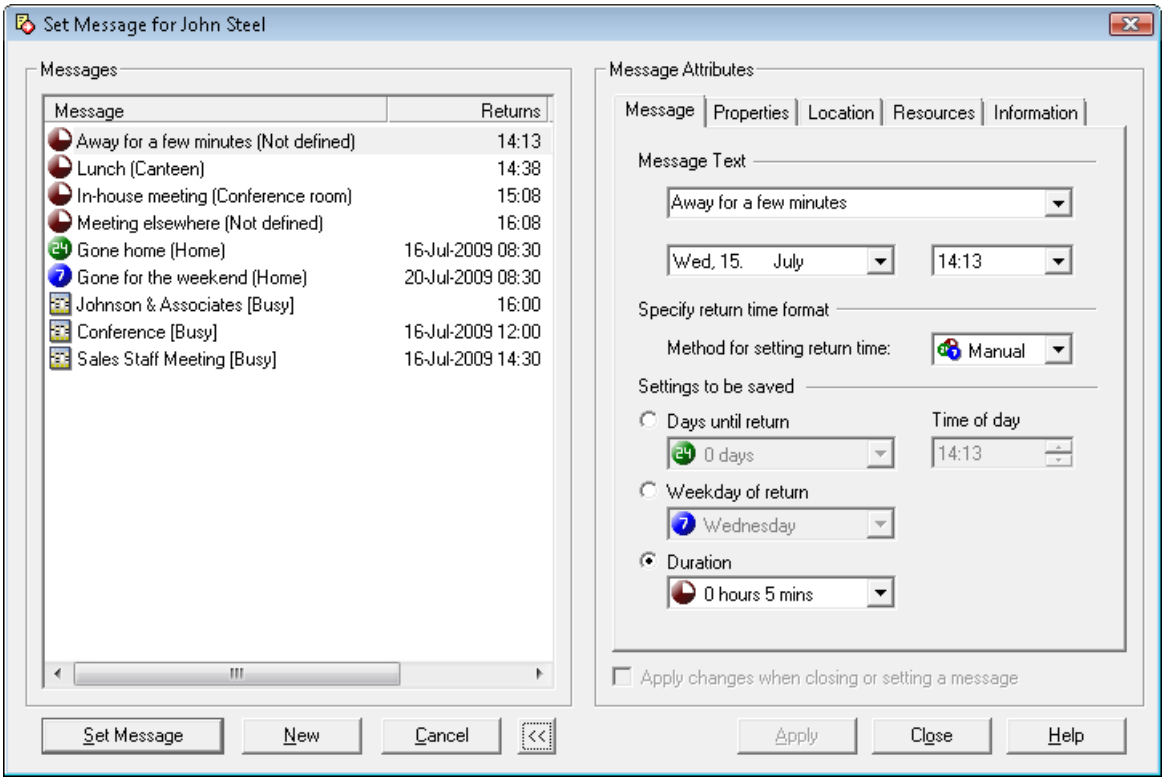

The chapter following the one about the simple mode will go into deeper detail about the many editing attributes of this *advanced mode*.

See Entering the Advanced Mode.

4.2 The Simple Mode

Setting (and clearing) predefined OutBack messages is the primary activity for most OutBack users, so this whole chapter is devoted to this subject alone. Everything you can do in the *unexpanded* **Set Message** dialog box is described in this chapter, including the use of the context menu you see when right-clicking an item in the list of stored messages.

4.2.1 Opening the 'Set Message' Dialog Box

This can be done in a number of ways, and the way you do this can have an effect on what kind of message you want to set. Here are the most common ways of invoking the dialog box:

- Select menu item **Message | Set Message**, or hit **F7**.
- Press the **Set Message** toolbar button.
- Press the global **OutBack** key (by default this is the Pause/Break key). Select the menu item **Options | Global OutBack Key** to open a dialog box where you can see which key has been chosen for this purpose.

If you want to set a specific message, you can open the dialog box with a hotkey. You can also set the most commonly used OutBack message with a specialized hotkey that will work anywhere in Windows. (See Setting a Message via the Global OutBack Key for more information about this.)

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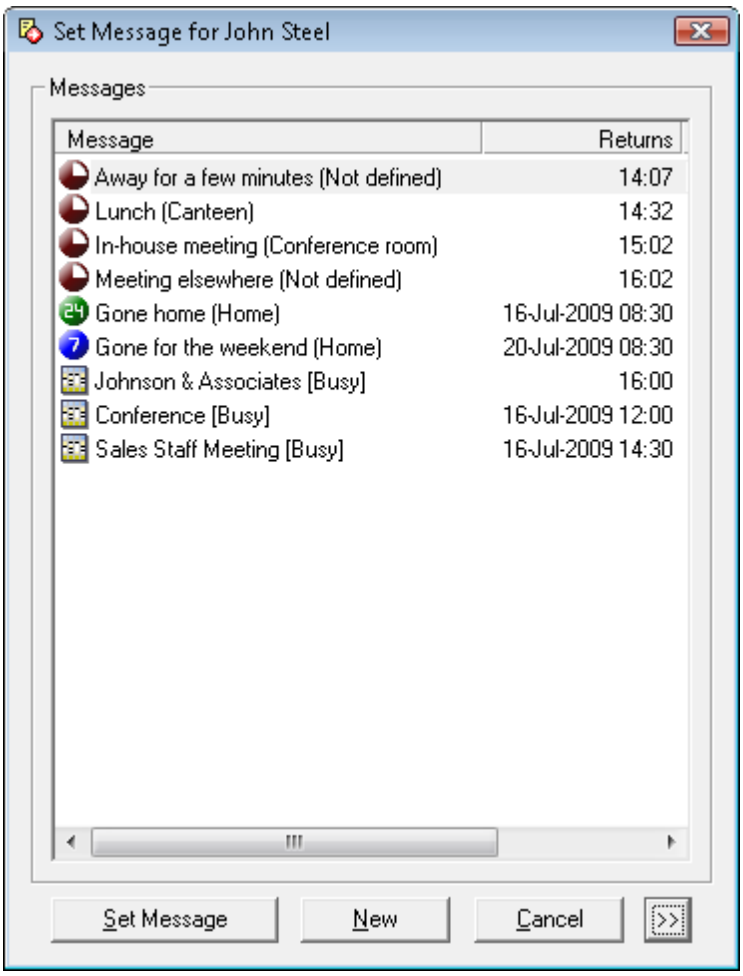
4.2.2 Overview of the Dialog Box in Simple Mode

The following is a typical representation of the **Set Message** dialog box with the items that resembles the ones created by the default installation:



The list box you are met with when you open the dialog box always shows you the list of messages that have been stored for multiple use. Setting a message from this dialog box can be done in any of the following ways:

- Single-click a message item, then press the **Set Message** button.
- Double-click a message item to select and set it in one go.
- Single-click a message item, optionally use the cursor up and down keys to select another item, then press **Enter** to set it.
- Right-click a message item and then select **Set Message** on the context menu that appears.

There are two columns visible at all times when you first open the dialog box. The first column, **Message**, shows the *message method* and the *message text*. The second column, **Returns**, shows the exact *return time* that you expect to be back when you select the message item. When you only see the time in hours and minutes without a date, it means that this time will in fact be later *today*.

It is not possible to set an OutBack message if its *return time* happens sometime in the past. Whenever you open the dialog box, OutBack will automatically update the *return time* of message items according to their *method*, but some messages may have an absolute time, and these might become obsolete. Whenever this happens, the **Returns** column in the list box will state "Time

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exceeded" and you will not be allowed to set the message.

Another situation that will prevent you from setting a message is if you select a *calendar message* that does not represent a valid appointment from your calendar, in which case you will see "N/A" in the **Returns** column. (We will get back to *calendar messages* later in Entering the Advanced Mode section).

4.2.3 The Available Message Methods

If you take a closer look at the message items in the **Message** column of the list box, you will see that each of them has a small icon in front of the actual *message text*. These icons define what we call the *message method*, which in effect tells you how the message calculates the *return time* (and in some cases even the *message text* itself). The following icons can appear in this column:

	Duration - this specifies that the message has been defined with a specific duration in hour and minutes. Typically used for "Gone a few minutes" (e.g. 5 minutes) or "Lunch" (e.g. 30 minutes). The *return time* you see in the **Returns** column is the duration added to the current time. If the time is e.g. 11:00 right now and the duration is 30 minutes, then the *return time* will state 11:30.
	Days until return - used for messages that span many days. A specific number of days can be defined for such messages, as well as a specific time of day - for example, "2 days at 10:30". A good use could be "Gone home", where you set "1 day at 08:30" to tell OutBack that you will return at 08:30 the next day.
	Weekday of return - this third option specifies a specific day of the week of return with a specific time of day. This is especially useful when making a "Gone for the weekend" message, where you want to return Monday at 08:30 in the morning, regardless of which day of the week you are actually setting the message.
	Calendar - OutBack can make use of the appointments in your Microsoft Outlook or Lotus Notes calendar - using both the *return time* and optionally the calendar *subject text* from the appointments. The number you see in front of the *message text*, i.e. "1: Meeting with James", indicates that this is the *first upcoming appointment*. If the appointment does not exist, you will see "<Calendar appointment **x** not available>" in the **Message** column and "N/A" in the **Returns** column. (Furthermore, you are prevented from setting the message.) *Calendar messages* will be discussed in greater detail in Entering the Advanced Mode.
	Solitary - this will only appear when you are *creating* a message - i.e. a message that will only exist this one time it has been defined and will not be stored. Typically, such messages are used for a specific date, like "March 3, 2009 at 08:30".

The above icons are the general icons used to specify the message method. However, the following icons may also be shown in case something is wrong:

	Warning - this indicates that there is a minor problem with the message, but it doesn't prevent you from setting it. This could be e.g. that an attached resource is reserved or that a *location* is undefined.
	Error - when this icon is shown, you are not allowed to set the message. This can be caused by e.g. the *return time* being invalid or that the *message text* is missing - but there can be many reasons.

Common for both icons is that you can always click the **Information** tab (in the advanced mode of the dialog box) to read about the problem there.

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4.2.4 Message Options

All messages in the **Set Message** list box may have various options or attributes applied to them. These options are in fact also visible in the list box. To view them, simply drag the scroll bar in the bottom of the list box to the right, revealing additional information for each message item.

The **Options** column will now show up, revealing up to three icons in a row for each message item. The first column of icons indicates the *display mode* that the message item will use. There can be three different modes here:

	No message window - if you see no icon in the first column of icons, it indicates that the message will be set in the data grid. No additional window or screen saver will be invoked on your PC.
	Show message window - setting this message item will both set it in the data grid and open a specialized *message window* on your PC. The window will display your message in a very large font, together with the time you left and when you expect to be back. This way, other users that approach your PC while you are gone can see this dialog box, and you will be reminded to clear your message when you return. Your screen saver will not be activated.
	Start screen saver - this option will set the message in the data grid, open the *message window*, and then start your screen saver. This is particularly useful if your company has a policy that requires you to lock your computer whenever you leave it. If your version of Windows has the screen saver called "Marquee", you can even let it display the OutBack *message text* and *return time*. Note that when you return to your computer and clear the screen saver, there will also be a *message window* which you will have to close. This way, you will be reminded that you have to clear the message.

Tip: *It is possible to see the display mode of message items without scrolling the list box to the right. Try clicking any item and then cursor up and down to browse the items. The icon in the top left corner of the dialog box will change to reflect the display mode of the currently selected message item in the list box. Note that "No message window" is shown as* .

The middle column of icons in the **Options** column may show a telephone icon, but only if your company is using one of the phone systems listed in Supported PBXs. Whenever this icon is present, it means that the message item will also set an action on your phone. This action can be "Do not disturb" or "Forward phone". If you want to examine exactly what action is set, you have to bring the **Set Message** dialog box into *the advanced mode* and then select the **Location** tab. (Please refer to How the Elements of the 'Location' Tab Work for more information.)

The third column of icons in the **Options** column indicates the *message type*, and it can be one out of three modes:

	Standard Message - when there is no icon shown here, it means that this is a *standard message*. This is the default and by far the most common type. A *standard message* has to be set normally, i.e. by selecting it in the dialog box or by using an optional hotkey.
	Default OutBack Message - this icon indicates that this message is the one selected when pressing the special global **OutBack** hotkey (which is available anywhere in Windows). Only one message can be the default **OutBack** message. Usually this is applied to the most commonly used message such as e.g. "Gone a few minutes". Please refer to Setting a Message via the Global OutBack Key for more information about this.
	Log Off Message - OutBack can automatically set a message for you every time you close OutBack, namely the one dedicated to be the *log off message*. Again, only one message can be of this type. Usually a message like "Gone home" is used as a *log off message*. Please refer to **Options | On Log Off** for more information about setting a message when logging off.

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4.2.5 Hotkeys

The last column in the **Set Message** list box, **Hotkey**, simply shows you if the message item has any hotkey assigned to it, and if so, which one. Hotkeys are available from **Alt+0** to **Alt+9**, offering a total of 10 hotkeys. If no hotkey is designated, "None" is displayed in the **Hotkey** column.

*Note that the special **OutBack** hotkey, which is available anywhere in Windows, is never stated in this column. Only by seeing the icon for "Default OutBack message" in the **Options** column can you tell that a given message item has been assigned the special **OutBack** hotkey. It is perfectly possible for such an item to have been assigned a normal hotkey as well.*

As soon as a message item has been assigned a hotkey, it will be possible for you to invoke it in the OutBack window. When you do this the **Set Message** dialog box will in fact still open, but this time the message item in question will already be selected. The dialog box will show a progress bar counting down from 2 seconds. As soon as the timer has reached zero, the dialog box will close and the message will be set. This way, you always have a way to regret the choice of a hotkey and quickly select another message, but on the other hand, you can just leave the PC immediately as the message will be set after 5 seconds.

Applying hotkeys to message items also affects another area of OutBack, namely the drop-down menu available by clicking the small arrow next to the **Set Message** toolbar button on the main toolbar. All messages that have a hotkey applied to them will appear in the bottom of this menu.

Selecting items from this drop-down menu will work exactly as if you pressed the hotkey directly, i. e. show the **Set Message** dialog box for 5 seconds.

4.2.6 Rearranging Message Items in the List Box

The items in the list box are not sorted in any way, they are merely added in the order they were created. Sometimes you may want to arrange them in a different order, for example to keep the most used messages in top. This can be done by using either a context menu or the dedicated hotkeys:

- **Using the context menu** - right-click the message item you wish to move. A context menu will appear with several options. Click one of the four options (**Move To Top, Move Up, Move Down or Move To Bottom**) in the bottom of the menu to move the item.
- **Using a hotkey** - as you might have seen in the context menu, you can just single-click a message item then press **Ctrl+Up** or **Ctrl+Down** to move the item right away.

When you are done moving message items about, either press **Set Message** or the **>>** button, and then the **Close** button to store the changes.

Deleting a Message Item

Just like when moving items you can do this from the context menu (right-click an item then select **Delete** on the menu that appears) or by single-clicking the item then hitting the **Del** key. Either way, you will always be asked whether you actually want to delete the item or not.

When you are done deleting message items, either press **Set Message** or press the **>>** button then the **Close** button to store the changes. (If you press **Cancel** nothing will be deleted, even if you pressed **Yes** in the confirmation dialog box.)

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4.3 The Advanced Mode

This relatively large chapter will discuss the various ways of creating new OutBack messages, both the kind to be stored and the solitary messages to be used only once. All the tabs of the expanded **Set Message** dialog box will be examined, including how to make *calendar messages*.

Please refer to The Simple Mode for information about the basic use of the dialog box, including how to invoke it, use and manage message items, and how to set messages.

4.3.1 Entering the Advanced Mode

There are several ways of entering the advanced *mode* of the **Set Message** dialog box, depending on whether you want to create or edit an existing message. The *advanced mode* of the dialog box is used in much the same way whether you are creating or editing a message, but certain shortcuts may jump directly to e.g. creating a message, thereby saving you a step. The following is a list of the possible ways of entering the *advanced mode*:

- The most common way is to just open the Set Message dialog box normally in simple mode (as described in Opening the 'Set Message' Dialog Box), then press the >> button to expand the dialog box and thus enter the advanced mode.
- If you wish to create a new message while in *simple mode*, just press the **New** button. The dialog box expands to enter the *advanced mode* and automatically prepares a new message for you.
- You can also create a new message right away by selecting the menu item **Message | New Message** or simply hitting **Shift+F7**.
- If you press the arrow button next to the **Set Message** button on the main toolbar, you open a drop down a menu with items. Here you can select the **New Message** menu item to create a new message.
- If you right-click any message item in the **Set Message** dialog box, you can select **New Message** on the context to enter the *advanced mode*. If you choose to create a new message by selecting the menu item **New Message** (or press **Shift+F7**), a new message will be created that has nothing in common with the message item that was originally selected in the list box. All the edit menu items, however, will affect this message item. The menu item **Edit Message** will expand the dialog box to enter the *advanced mode*, showing the **Message** tab. **Edit Properties**, **Edit Location** and **Edit Resources** will do the same, albeit these will select the **Properties** tab, the **Location** tab, and the **Resources** tab respectively. The menu item **See Information** is somewhat related in that it shows the **Information** tab. However, this tab contains only information and has no properties.

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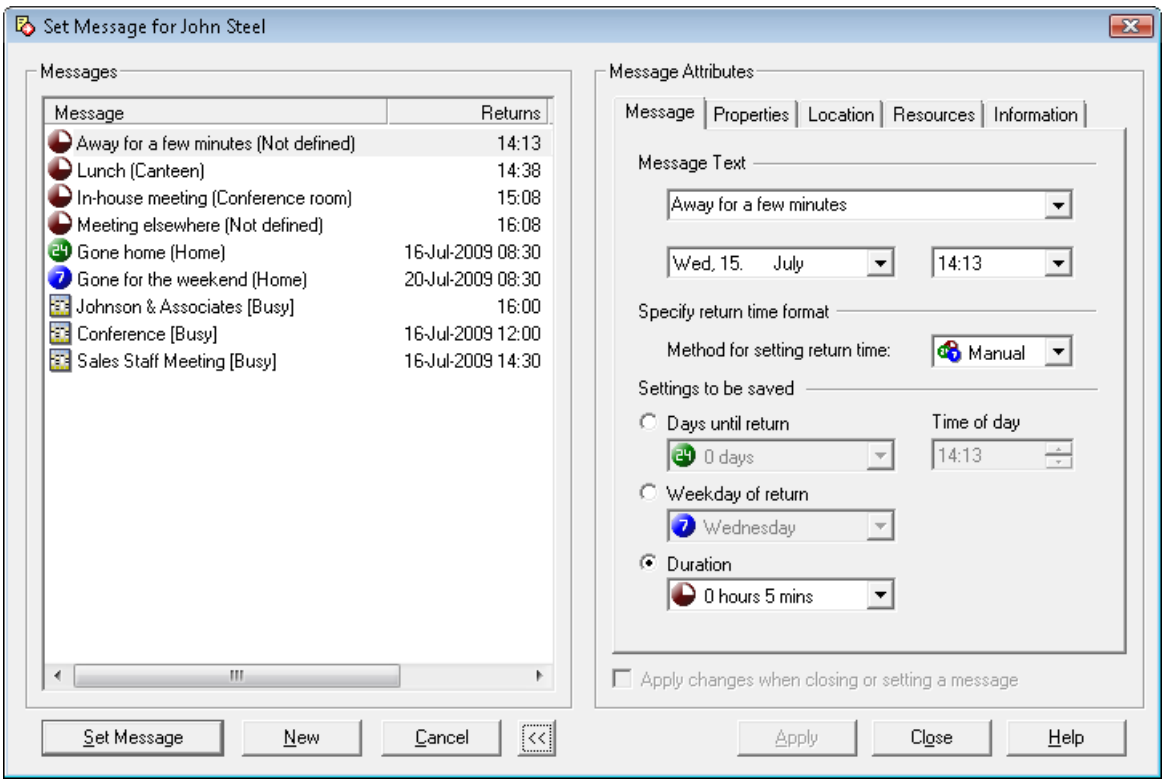
4.3.2 Overview of the Dialog Box in Advanced Mode

In *advanced mode*, the dialog box is always twice as big as normal in order to show the various control boxes for editing messages.



The editing area of the dialog box is split up into five tabs, which you can browse at any time by simply clicking the titles of the tabs.

- **Message** - this is the most important tab. It defines the *message text*, *message method*, and the *return time* of a message item. The method may be ***manual*** (a normal message to be stored), ***solitary*** (a single message to be used only once) or a ***calendar*** (a message inspired by your calendar program). When choosing ***calendar***, the layout of the tab changes slightly to make room for controls used to access the appointments in your calendar program. This can contain information such as which number, whether to use its *subject text* or not, and its *return time*.
- **Properties** - here you can define the *display mode* (use a *message window*, a *screen saver*, or *no window*), the *message type* (*standard message*, a *default OutBack message*, or a *log off message*), and you can apply a *hotkey* to the message item. It is also in this tab that you can decide whether you want to log the message or not.
- **Location** - it is optional whether you want to define the *location* and the *telephone number* associated with a message, but it can be useful information in case anyone wants to contact you when you are not at your desk. The *location* and the *telephone number* can be associated with stored messages. Furthermore, it is possible to set the status of your telephone when a message is set, e.g. "Do not disturb" or "Forward phone" to another telephone number. However, the latter is only possible if your company is using one of the phone systems listed in Supported PBXs.
- **Resources** - this tab shows a list of available resources (such as meeting rooms or projectors), which can be associated with activity messages. When you later set a message with one or more of these resources attached, both your own status and the status of the resources will be changed (provided that they're not booked by someone else).

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- **Information** - here you can see if there are any errors or problems with your OutBack message. All kinds of warnings and/or errors will be explained in this tab.

One of the strongest features of the *advanced mode* is that all the control boxes in all three tabs are *context sensitive* relative to the currently selected message item in the list box. What this means is that when you select other message items in the list box, the control boxes will change to reflect its settings. This makes editing and managing new and existing message items easy, and it even makes it possible for you to create several new message items in one single session.

About Saving Your Changes

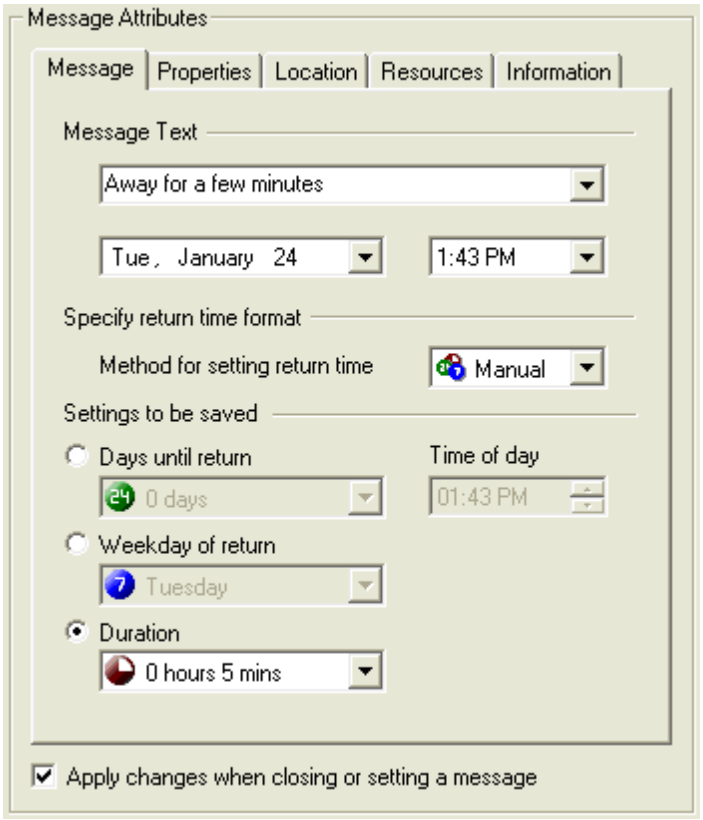
Whenever you make changes to an existing message or create a new one, you have the option of storing it for future use. Simply tick the **Apply changes when closing or setting message** check box in the bottom of the dialog, and then either set a message or press the **Close** button.

OutBack will try to predict whether it is relevant to leave the check box checked or not depending on the action you take. In some situations, the check box line will even be disabled when it is irrelevant to save the changes - like when you are creating a ***solitary*** message to be used only once.

Tip*: If you have made changes to a message and wish to save it, always make sure this check box line is checked before closing the dialog box - or the changes will not be saved.*

4.3.3 How the Elements of the 'Message' Tab Work

Lets us begin with the most important yet also the most advanced tab of them all, namely the **Message** tab. This is the tab you usually see immediately when choosing to edit or create a message. The layout of the tab differs depending on what *method* you have selected in the **Method for setting return time** box. Below it is shown in "Manual" mode:



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Message Text

The top drop-down box is where you write (or in some cases, see) the *message text*. This is the text that will appear in the **Message** column of the data grid, with a large font in the optional *message window*, or in the scroll text of the screen saver called "Marquee" (if this is selected in Windows).

There always needs to be a *message text* here or the message item will be invalid. In the case of a *calendar message*, you either have to fetch the *subject text* of an existing appointment or write your own text. The *message text* can be anything, but should preferably be something descriptive such as "Away for a few minutes" or "On vacation in Paris :-)".

Press the drop-down arrow button to open a list with existing messages. In a secondary section of the list, you will also see a list of similar items from the appointments of your calendar, if available. Whether you see both the *return time* and the *message text* or only the *message text* alone depends on the *message method*.

If you are creating a ***solitary*** message (a message to be used only once), you will see both *return time* and *message text*. As soon as you click any of these message items, both these attributes are applied to the controls of the **Message** tab. You can then choose to go with that as it is or change the data slightly and come up with the desired version.

If you are creating a ***manual*** message, then the list will only show the *message text* of the items. Selecting an item in this situation will only affect the **Message Text** box.

If you are creating a ***calendar*** message, the first upcoming message will be used to fill in the **Message Text** box and **appointment information** box. As time passes OutBack, will update the **Message Text** and **appointment information** using the relevant appointment in the calendar.

The Date Box

Just beneath the **Message Text** drop-down box you will see the date drop-down box. When creating a new message, it always starts off by showing the current date.

Regardless of the *message method* selected in the tab, this box will always be available, making it possible to select a specific date at any time. The date you select in the box will then affect the other date and time boxes in the tab. This goes the other way around too; if you alter the date and time elsewhere in the tab, the date box will be updated to reflect the changes.

To use the box you normally just click the drop-down arrow button. In the small calendar that pops up you can now browse the months with the sideways arrow buttons and then click a return date. Note that you are not allowed to select a date in the past.

You can also select the *date* or *month* in the date box and change it directly with the cursor keys without dropping down the small calendar, although it is usually far easier to just drop down the small calendar and select a date there.

The Time Box

To the right of the date box you will see the time combo box. When creating a new message, it always starts off by showing the current time. However, as the current time is not a valid return time, the text "Time exceeded" will be shown in the message item currently being edited in the list box. Until you change the time to somewhere in the future, you are not allowed to set the message. Similarly, if you select a time in the past "Time exceeded" will show up again in the list box.

Regardless of the *message method* selected in the tab, this box will always be available, making it possible to select a specific time of day at any time. The time you select in the box will then affect the other date and time boxes in the tab. This goes the other way around too; if you adapt the date and time elsewhere in the tab, the time box will be updated to reflect the changes.

Click the arrow drop-down button on the time box. In the list you can now scroll up and down to gain access to the 24 hours of the day, in 15 minute intervals. Around the current time you can even select "+5 Min", "+10 Min" or "+15 Min" to add these minutes to the current time.

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When you select the ***calendar*** *message method*, the date and time boxes will usually be changed to reflect an appointment in your calendar. Because of this, the "+5 Min", "+10 Min" and "+15 Min" items are removed from the list.

Method for setting return time

The drop-down box **Method for setting return time** is an important setting in the tab. It decides what kind of message you want to create, which in itself may affect everything about the OutBack message - how the *return time* is derived, how the *message text* may be edited, and whether you can save the message for future use or not. There are three options to choose between:

Solitary - this method indicates that this is a message that will only exist this one time it has been defined. Typically, such messages are used for a specific date, like "March 3, 2009 at 8:30 AM". Whenever you have selected this option, you will have a reduced set of control boxes at your disposal:

- On the **Message** tab, only the **Message Text**, the small calendar date box, and the time box will be available.
- Because of the nature of the one-shot message, you must select a specific time in the future using the date and time boxes.
- As soon as you have created a *message text* and defined a *return time* in the future, you are allowed to set the message - but you cannot save it.
- You can set the *display mode* and the *telephone action* in the other tabs, but you are not allowed to set a *hotkey* or *type* as you cannot save it.
- As soon as you set the message, it will look just like a ***manual*** message, i.e. it will be visible in the data grid and you can choose to have it open a *message window* or the *screen saver*.

Manual - this is the method you must choose if you plan on reusing the message over and over again. The method will make it possible to define the *return time* using a more flexible range of control boxes than when setting a ***solitary*** message:

- All control boxes in all five tabs will be available to you. You can define the *return time* by adding up days, choosing a weekday, or by setting a duration in hours and minutes. If you select a specific date and time in the boxes that are also available in ***solitary*** mode, you will actually affect whatever *return time* method you have selected in the **Message** tab. A ***manual*** message cannot be set to a specific date in the future.
- As soon as you have created a *message text* and defined a *return time* in the future, you are allowed to set the message and/or save it for future use.
- You can set the *display mode*, t*elephone action*, *message type* (standard, log off or for use by the global **OutBack key**), or you can dedicate a *hotkey* to the message.
- When you have saved the message, it will be available in the list box the next time you open the **Set Message** dialog box. If you assigned it a *hotkey*, it will also appear in the drop-down menu on the main toolbar.

Calendar - the third and final method makes it possible to define a message that will be "inspired" by one or more appointments in your calendar program (such as Microsoft Outlook or Lotus Notes). Just like the ***manual*** message, it can be saved and reused.

- When the method is selected, the layout of the **Message** tab will change considerably to make room for controlling what appointment number you want to take the *return time* from, and optionally the subject text as the *message text*. Because you can select an appointment far into the future, OutBack can be set to automatically update the message text whenever other calendar appointments occur in the meantime. In other words, OutBack can *follow your calendar*, thereby saving you the trouble of having to define your reason of absence in two programs.

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- The *message text* can be your own or derived from the calendar, and you can decide whether free time between appointments will show your own text or just continue with the text from the previous appointment until the next one starts.
- As soon as the *message text* and *return time* are in place, you are allowed to set the message and/or save it for future use.
- You can set the *display mode*, *telephone action*, or you can dedicate a *hotkey* to the message. You can also set *message type* to a standard type or for use by the global **OutBack key**, but you cannot set it to a log off type. This is due to the fact that a log off type message is set when OutBack is closing down.
- When you have saved the message, it will be available in the list box the next time you open the **Set Message** dialog box. In contrast to ***manual*** messages, ***calendar*** messages will not appear in the drop-down menu on the main toolbar if you assign a hotkey to it. However, you can still invoke it with the *hotkey*.

When you enter the *advanced mode* with the purpose of creating a new message, the **Message** tab will usually show "Solitary" by default. (This can of course be changed as described.)

Days until return

*Only available when creating a **manual** message to be saved. Please refer to The Available Message Methods for more information about this.*

When the radio button for **Days until return** has been selected, both the appropriate drop-down box and the **Time of day** box will be enabled. (Note that whenever you decide to create a ***manual*** message to be saved, the **Days until return** radio button will already be selected as the default method.)

This method is used for messages that span many days. A specific number of days can be defined for such messages, as well as a specific time of day - for example, "2 days at 10:30 PM". A good use could be "Gone home", where you set "1 day at 8:30 AM" to tell OutBack that you will return 8:30 AM next day.

It is possible to select 0 days and a time earlier than the current time. In this case, the message item being edited in the list box will state "Time exceeded" and you will not be able to set the message. Only a *return time* in the future is valid. The message can still be saved and used another day before the specified hour.

To set "2 days at 10:30 PM", Simply click the drop-down arrow button in **Days until return** and select "2 days" in the list. Then click the *hours field* of the **Time of day** box and either type "10" or click the small up/down arrow buttons to browse to the correct number. Now click the *minutes field* and make it read "30", and then finally click the *AM/PM field* and type "P" to make it read "PM".

The penultimate item in the drop-down list usually shows "14 days" as default. If the date and time is adjusted elsewhere in the tab, the **Days until return** and **Time of day** boxes will of course be affected too. The number of days shown will utilize the existing day items in the drop-down list, but if this is not available on the list then the penultimate item will be modified by OutBack to reflect it.

If you wish to enter a number of days not available in the drop-down list, simply select the last item called "Custom...". This will open a small dialog box where you can type any number of days between 0 and 9999.

Either type in the number in the edit box or use the small up/down arrow buttons to browse to the correct number, and then press **OK**. The number you define in this small dialog box will be reflected by the penultimate item in the drop-down list.

Weekday of return

*Only available when creating a **manual** message to be saved. Please refer to The Available Message Methods for more information about this.*

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To make a message item that defines a return time on a specific weekday, click the **Weekday of return** radio button. Only the **Weekday of return** box and the **Time of day** box will now be enabled for editing.

The method specifies a specific day of the week of return with a specific time of day. This is especially useful when making a "Gone for the weekend" message, where you want to return Monday at 8:30 AM in the morning, regardless of which day of the week you are actually setting the message.

When selecting **Weekday of return** a day within the upcoming week must be selected, i.e. a date no more than a week into the future. Any date chosen beyond this period will not be accepted.

To set "Next Tuesday at 2:00 PM", simply click the drop-down arrow button in **Weekday until return** and select "Tuesday" in the list. Then click the *hours field* of the **Time of day** box and either type "02" or click the small up/down arrow buttons to browse to the correct number. Now click the minutes field and make it read "00", and then finally click the *AM/PM field* and type "P" to make it read "PM".

Duration

*Only available when creating a **manual** message to be saved. Please refer to The Available Message Methods for more information about this.*

If you want to define a specific duration, click the **Duration** radio button. Only the **Duration** box will now be available for editing.

This method specifies that the message has been defined with a specific duration in hour and minutes. Typically used for "Gone a few minutes" (e.g. 5 minutes) or "Lunch" (e.g. 30 minutes). The *return time* you see in the **Returns** column in the list box is always the duration added to the current time.

You can select one of the predefined hours and minutes items by clicking the drop-down button and then select an item on the list. All the other date and time boxes in the tab will be affected once you select an item.

Note that if you select "0 hours 0 mins", you will see that the edited message item in the list box states "Time exceeded". If you are editing the *return time* by using the other boxes in the tab, you may even reach a situation where the **Duration** box will state a negative duration. However, you have to select a positive duration before you are allowed to set the message.

If the date and time is adjusted elsewhere in the tab, thereby indirectly affecting the **Duration** box, it may show hours and minutes that do not exist as one of the normal items in the drop-down list. In this case, the penultimate item in the list will be modified by OutBack to reflect it.

If you wish to directly enter a duration of hours and minutes not available in the drop-down list, simply select the last item called "Custom...". This will open a small dialog box where you can type any number of hours between 0 and 9999, as well as minutes between 0 and 59.

Either type in the numbers in the edit boxes or use the small up/down arrow buttons, then press **OK**. The number you define in this small dialog box will be reflected by the penultimate item in the drop-down list.

Return appointment subject and Appointment information

These are solely information boxes and cannot be edited. Their purpose is to show you what the appointment from your calendar program looks like.

The information box changes depending on the appointment number selected in the **Use return time from appointment number** box, which can be 1 to 21. When creating a ***calendar*** message from scratch, 1 is default to begin with - which denotes *the first upcoming appointment*. This also means that the information box may show you a different appointment from the calendar, depending on when you open the **Set Message** dialog box.

Whenever OutBack fails to find an appointment from the calendar program, the information box will

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state "<Calendar appointment **x** not available>", where **x** is the value from the **Use return time from appointment number** box. The reason for this can be one of the following:

- **There are no more appointments in your calendar**. You have reached a point in your calendar program, where there are in fact no more appointments to be read
- **OutBack is not allowed to look any further**. If you go to the main OutBack window and select menu **Options | Calendar Settings**, you can decide if it should read the appointments from your calendar. If turned off, all appointment numbers from 1 to 21 will all show "<Calendar appointment **x** not available>". There is also a limit on how far ahead OutBack can access appointments, which is typically 7 days.

If you browse the **Use return time from appointment number** box from 1 to 21, the *return time* from the existing appointments OutBack finds will automatically set the date and time boxes just below the **Message Text** box.

Use return time from appointment number

This is a small drop-down box from which you can choose among appointments number 1 to 21 in your calendar program. When creating a ***calendar*** message from scratch, 1 will always be the default to begin with - which denotes *the first upcoming appointment*. The number you select in this box will always be inserted in front of the *message text* in the list box, so that you can tell what appointment number a ***calendar*** message is using when the **Set Message** dialog box has merely been opened in *simple mode*.

Because the appointment numbers are based on a count of appointments from the current time, a stored calendar message will state a new appointment return time as the appointments gradually become obsolete. If the calendar message has been defined to use the subject text of the appointment as the message text, this too will change as appointments become obsolete. However, it is possible to define an alternative message text that will be displayed instead. This could be useful when you want to make it clear that e.g. the following four meetings in your calendar should all be referred to as "Meeting in London".

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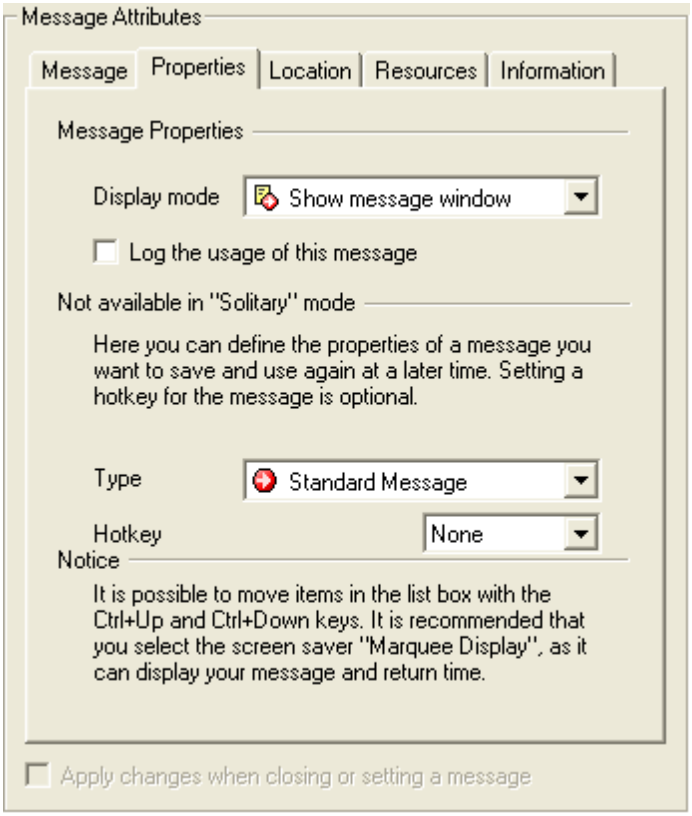
4.3.4 How the Elements of the 'Properties' Tab Work

This is the tab where you can set secondary attributes for the messages in the list box. The tab looks like this:


Message Attributes
Message
Properties
Location
Resources
Information
Message Properties
Display mode
Show message window
Log the usage of this message
Not available in "Solitary" mode
Here you can define the properties of a message you want to save and use again at a later time. Setting a hotkey for the message is optional.
Type
Standard Message
Hotkey
None
Notice
It is possible to move items in the list box with the Ctrl+Up and Ctrl+Down keys. It is recommended that you select the screen saver "Marquee Display", as it can display your message and return time.
Apply changes when closing or setting a message

Display mode

Whenever you are setting a message in OutBack, it will always be displayed in the data grid so that both you and all other users can see that you are busy. On top of all this, you can choose to display the message on your computer in a separate *message window* or in a *screen saver*. There are great benefits of this. First of all, it will remind you to clear your message when you get back, and other users that see your computer while you are gone will immediately be reminded why you are gone, and when you will be back. The **Display mode** drop-down box has three options:

- **No message window** - If you select "No message window", setting the message will only display your *return time*, *message text*, *location* and *current phone number* in the data grid. This can be used in situations where OutBack is subsequently shut down, e.g. with the message "Gone home" - or if you are still at your desk, but don't want to be disturbed. Make sure you remember to clear your message when you later return to your computer.
- **Show message window** - If you want to display a message window when creating a new message, then you must select "Show message window" in the drop-down box. As soon as you set a message with this option, the data grid is changed to reflect the new *return time*, *message text*, *location* and *current phone number*, then immediately followed by opening a message window. The message window will show your message text in a large font. The return time is just beneath the text, and further down is the location and the current phone number you may have specified in the new message. In the bottom you will see when you set the message and the phone settings that may have been applied. The latter requires that the company has one of the phone systems listed in Supported PBXs. The message window is always topmost, meaning that

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it will sit on top of all other windows even if you try to activate them. If you want to temporarily hide the window, simply click the minimize button in the top right corner of the window box - as with other windows. The large font in the message window will always adapt to the width of the actual text, so a shorter message means a larger and more striking text. When you return later and want to clear the message (and remove the message window), click the I'm back - clear message button or just press either **Esc**, **Space** or **Enter**. You can also press the global **OutBack key** to clear the message, even if you didn't originally use that key to set the message. (Please refer to Setting a Message via the Global OutBack Key for more information about the global OutBack key.)

- **Start screen saver** - When you select this option, you can make OutBack start the screen saver (if you have setup Windows to use a screen saver). If you have access to the screen saver named "Marquee", it will even display your message text and return time in its scroll text. OutBack will also open a message window. Note that the location and current phone number will not be shown in the scroll text of the screen saver. As soon as you return to your computer, simply deactivate the screen saver as you are used to do it, then hit **Enter**, **Space** or **Esc** to remove the message window and clear your message in one go. (Please refer to "Show message window" above for more information about the message window.)

> If this drop-down box is disabled (i.e. you cannot select anything in it), it means that the IT department made sure only the screen saver can be utilized. This may have been done because of security related reasons, since a screen saver can lock your computer when activated.

Logging

It is possible to log the use of each individual message, so that you may later see a list of when you set certain messages. Tick the check box **Log the usage of this message** and the message will then be logged to a text file each time you set or clear it.

All logging of messages must be activated by the dialog box you open when you select the menu item **Options | Message Logging**.

> It is important to realize that logging is something that you control. No one is monitoring your use of OutBack, and you can always choose to clear the check box for individual messages - or even disable the entire logging completely by selecting the menu item mentioned above.

Type

*This is not available when creating a **solitary** message. Please refer to **Method for setting return time** in the How the Elements of the 'Message' Tab Work section for more information about this.*

The message type defines how the stored message item may be utilized in OutBack. There are the following types available in the drop-down box:

- **Standard Message** - this is the default and by far the most common type. A standard message has to be set normally, i.e. by selecting it in the **Set Message** dialog box or by using an optional hotkey.
- **Log off Message** - OutBack can automatically set a message for you every time you close the program, namely the one dedicated to be the log off message. Usually a message like "Gone home" is used as a log off message. Only one message can be of this type, and it must be a manual message. A calendar message cannot be used as a log off message, please refer to **Options | On Log Off** for more information about setting a message on log off.
- **Default OutBack Message** - when a message item has been set to this type, it indicates that this message is the one selected when pressing the global OutBack hotkey (or the icon on the

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main toolbar), which is available everywhere in Windows. Again, only one message can be of this type. Usually this is applied to the most commonly used message such as e.g. "Gone a few minutes". Please refer to Setting a Message via the Global OutBack Key for more information.

Hotkey

*This is not available when creating a **solitary** message. Please refer to **Method for setting return time** in the How the Elements of the 'Message' Tab Work section for more information about this.*

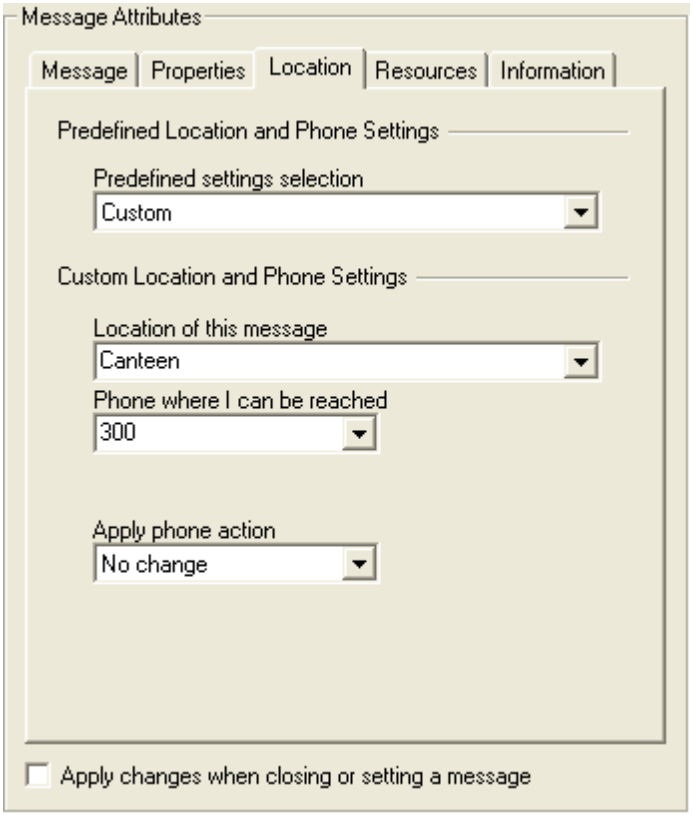
All messages that can be stored may have a hotkey assigned to it. Simply open this drop-down box and select one of the available ten hotkeys. As soon as a message item has been dedicated a hotkey, it will be possible for you to invoke it in the main OutBack window.

If you select a hotkey that has already been assigned to another message item, you will see a dialog box asking you whether you want to reassign the hotkey to the message you are currently editing. One hotkey cannot be assigned to more than one message item at any time.

Please refer to Hotkeys for more in-depth information about hotkeys, their usage, and how they affect OutBack.

4.3.5 How the Elements of the 'Location' Tab Work

The Location tab can add even more detail to your OutBack messages, but using it is optional.



The first drop-down box, **Predefined settings selection**, may change all the other controls in the same tab, and works as a collection of predefined settings that are be copied to the other controls.

The predefined settings are created and maintained in a dialog box that may be accessed with menu item **Message | Manage Locations** - it is also in this dialog box that you can define the phone

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number and location to be used, when you haven't set a message.

As soon as you activate one of the other edit boxes and begin making your own adjustments, the drop-down box automatically show "Custom", to let you know that you are now editing information that is only relevant for this message. In other words, the information will not be added to the dialog box **Manage Locations**.

When you have specified a *location* for a message, it will be indicated after the *message text* in the list box, where it is appended in parenthesis. This way, you can always see the associated location in the simple mode of the dialog box.

In the drop-down box **Location of this message** you can define where you can be reached when the selected message is set.

Make sure you choose a location that fits the selected message - for example, it would be logical to write "Canteen" if you are editing the message "Lunch".

The next drop-down box, **Phone where I can be reached**, should contain the phone number where you can be reached when you are at the specified location. This could be a fixed line available in the area, or it can be a mobile (cell) phone you brought along. The point is that other employees in the company only have to take a look at one column in OutBack to see the phone number where you can be reached.

The drop-down box also allows text, so alternatively you may write something like "No phone" - e.g. if you are having lunch in the canteen.

The last drop-down box, **Apply phone action**, will only be useful if your company is using one of the phone systems listed in Supported PBXs. If this is not the case, then you can skip ahead to the next heading.

Those that are using one of the supported telephone systems may utilize one of the following four status items for any message:

- **Clear phone** - this resets your telephone in case another action like e.g. "Do not disturb" has been used previously. This is especially important in the situation where you have selected a specific telephone action when you haven't set a message - this is possible in the dialog box available with menu item Message | Manage Locations.
- **Do not disturb** - when selected, setting the OutBack message will automatically set this action on your phone.
- **Forward phone** - if you select this action, a **To this number** drop-down box will appear in which you can type a phone number or select a number if shown. As soon as you set the OutBack message, OutBack will then automatically tell the telephone system to forward all phone calls to this number instead.
- **No change** - this is the default and simply indicates that when you set the OutBack message, nothing will be done with your phone.

If you are using a *message window* to display your OutBack message when you are gone, it will state the selected telephone action if you have chosen to set a telephone action.

As soon as you return to your computer and clear your message, OutBack will automatically cancel the telephone action on your phone as well. (If you have used the menu item Message | Manage Locations to set a telephone action when you don't have a message, then this telephone action will be activated.)

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4.3.6 How the Elements of the 'Resources' Tab Work

There are two different types of rows in the data grid; *users* and *resources*. Resources can be reserved by all users and may be e.g. a meeting room, a projector or a company car. In this tab you can attach the reservation of one or more resources to a message, so that you automatically reserve it/them when you set the message. This can really be an advantage if you have defined a message with the text "Meeting" - a message of this kind would perhaps benefit from having a meeting room attached, if you are e.g. a project manager.

All the resources in the company can be seen in the tab accessed by **Message | New Message | Resources.**

Available

Temporarily reserved

Reserved for the day

When you select this tab, you will not only be able to see all the resources, you will also be able to see if some of them are currently reserved. Those that are available are indicated with a green square, while those that are reserved are indicated with a yellow or red square and a message. In this tab you cannot see who has reserved the resources, however. If you are interested in knowing this, you have to close the **Set Message** dialog box and take a close look at the resources in the data grid. The name of the person who made the reservation can be found in parenthesis after the message itself.

In order to attach a resource to a message, you must select one of the resources in the list box. If you want to select more than one, hold down **Ctrl** while clicking them. All attachments can be removed again by pressing **Deselect All**.

When you open the **Set Message** dialog box in the *simple mode*, you can always see whether the attached resources are available for any message in the list box with message items. If they are not available, a yellow warning symbol will be seen. Now you can click the **Resources** tab (in the advanced mode of the dialog box) in order to see which ones are actually taken. If one or more of the attached resources are occupied, it is in fact still possible to set the message - only the already reserved resources will not be reserved by you.

When you return from where you have reserved one or more resources and clear your message, both your own message and those of the attached resources will be cleared. Of course, this does not apply to the resources that were already booked at the time you originally set your own message.

4.3.7 How the Elements of the 'Information' Tab Work

This tab is only used for information and serves as a help to explain why a warning or an error is indicated for any given message. Every time you see a yellow warning symbol or a red error symbol for a message in the list box, you can always click this tab to read what is wrong.

The tab describes all the errors that may arise regarding a message, both concerning exceeded *return time*, if a *calendar message* was not obtained from the calendar program, if one or more resources were booked, or if the *message text* is empty. Warnings are not critical, i.e. you are still allowed to set the message, but if there is a critical error in the message you are not allowed to set the message before it has been corrected.

The list box in this tab is dynamic, i.e. it modifies its text contents while you are fixing something in the other tabs. The same applies to the symbol of the message in the list box with message items. When you no longer see a yellow warning symbol or a red error symbol, the message is ready for use.

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4.4 Setting a Message via the Global OutBack Key

One of the most important features of OutBack is the global **OutBack** key. This key will probably be the one you are going to use the most in OutBack. The major difference in setting and clearing a message with this key is that it is always globally available, no matter what application is currently active.

Because the hotkey is so important (and so often used), we have created a sticker that you can put on this key to remind yourself it's there. (If you haven't received such a sticker, contact your IT department to get one).

So, if you are e.g. working in a text processor, just hit the **OutBack** key right away. This opens the **Set Message** dialog with a countdown of 5 seconds, where the message item that has been associated with the **OutBack** key is already selected. Now you can just leave your computer and let OutBack count down, thereby selecting and setting the most common OutBack message. Alternatively, you can cursor up or down the list of messages to choose one you think is more appropriate, and then set it instead.

For use with the **OutBack** key, you can create a message in exactly the same way as you create other messages - for example "Away for a few minutes". For information about how to create a message item, please refer to The Advanced Mode.

The exact key that will be used as the global **OutBack** key is up to you. As default, the **Pause** key has been assigned to be the **OutBack** key, but it may be almost anything else. Please refer to **Options | Global OutBack Key** for information about how to select the key you want to use.

When a message has been set by pressing the **OutBack** key, it can be cleared again by hitting the same key. In fact, you can clear any message you have set by pressing the **OutBack** key, even if you originally didn't set it that way. The **OutBack** key functions as a toggle between cleared and set message. To help you see when you are in fact clearing or setting a message, OutBack will always show an animated popup window to indicate what status OutBack has after you have pressed the **OutBack** key.

When you change your status in OutBack, with the OutBack hotkey or in some other way, a popup is shown for a few seconds in the bottom right-hand corner of the screen, depending on the location of the system notification area.

4.5 Clearing the Current OutBack Message

Clearing your current OutBack message, and thus indicating that you are available for e.g. telephone calls, is something we have tried to make as simple as possible.

The following paragraphs describe how to clear your current OutBack message in five different situations:

- when you start the OutBack program
- using the globally available **OutBack button**
- when you have an OutBack message window on your screen
- when you don't have an OutBack message window on your screen
- when you have a screen saver running

No matter how you clear your message, any resources that may have been attached to the message will also be cleared. See How the Elements of the 'Resources' Tab Work for more about

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attaching resources to a message.

4.5.1 Clearing the Message when you start the OutBack Program

It can be a great advantage to make OutBack clear the active message (if it exists) when OutBack is started. This way, the message you set in OutBack the day before will automatically be cleared when you switch on the PC and start OutBack in the morning. If you have been to a meeting and have shut down your PC while you were away, then when you come back and start the PC again you want to clear the "Meeting elsewhere" message that you posted before you left.

This automatic clearing of the current OutBack message when you start the OutBack program is controlled by menu item **Options | On Startup | Clear Message On Startup**. This option is on by default, but you can turn it off if you prefer to manually clear the current OutBack message.

4.5.2 Clearing the Message using the OutBack Key

No matter if your message displays a message window or not, you can always clear the message by simply hitting the global **OutBack Key**.

For more information about the global **OutBack Key**, please refer to Setting a Message via the Global OutBack Key.

4.5.3 Clearing the Message when an OutBack Message Window is displayed

If you have an OutBack *message window* on your screen, then all you need to do to clear the current OutBack message is to click on the following button:

You can also hit **Esc, Space**, **Enter**, **B**, **Alt+B or Pause**, all of which implies the activation of this button.

4.5.4 Clearing the Message when there is no OutBack Message Window

If there is no OutBack message window being displayed and you want to clear the current OutBack message, then there are no less than five ways of doing this in OutBack:

- You can click on the **Clear Message** button on the toolbar:

- You can do it by clicking the small arrow button next to the green toolbar button and then select the **Clear Message** item on the drop-down menu that appears.
- You can use the menu item **Message | Clear Message**.
- You can use the shortcut key for this function, which is the **F8** key.

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- You can simply hit the global OutBack key. (Select menu item **Options | Global OutBack Key** to open a dialog box that will show you which key this may have been assigned to.)

4.6 Setting Messages via Cell Phones

OutBack has the ability to receive and react to messages from a cell phone, provided your company has this feature enabled. The OutBack SMS Gateway lets you set your OutBack status from your cell phone, while away from your computer. Your company's IT administrator will inform you of the OutBack SMS Gateway's phone number.

4.6.1 SMS Gateway Commands

The commands that the gateway accepts are:

- C - Clear your last message and indicate that you are available.
- D - Set your stationary phone to "Do not disturb".
- F <extension> <number> - Forward a stationary phone <extension> to phone <number>.
- H - Receive help message containing list of SMS commands.
- L <location> - Set the users location to <location>.
- M <message> - Sets <message> as your current message.
- N <local number> <notice> - Send a notice to user with <local number>
- Q <local number>- Query status of user with <local number>. The user's status is received as an SMS.

In addition to these commands, your company may have defined additional commands that are accepted.

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V Searching the Data Grid

Overview
Search Columns
How the Search Result is Shown
The Search Methods

5.1 Overview

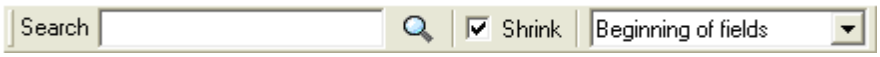
OutBack has been developed to make a search in the data grid as simple and fast as possible. To satisfy the needs of as many users as possible, OutBack has several adjustments that can be made.

Normally, only certain columns are searched through. These columns are the so-called ***search columns***, which is a group of columns defining the search scope. This way, every time you search for something in the data grid only the rows will be found where the search criteria is matched in the defined ***search columns***. It is even possible to browse through these columns, one at a time, to reduce the scope of the search even further. If, however, you wish to temporarily search in one of the columns not defined as a ***search column***, you can always mark one or more columns. When you then perform the search as usual, the result will only be found in the marked columns.

To make searching even faster, any letter or numerical key typed on the keyboard will immediately appear as the search text. As soon as you pause the typing (or press **Enter**), the data grid will be updated to reflect the search result. (This dynamic update can be circumvented in the **Options** menu to *require* that you press **Enter**.) How the data grid reflects the search result depends on whether the **Shrink** check box is checked or not. The data grid shrinks to show only the relevant rows whenever it is checked. When the **Shrink** option is not checked the search result appears as selected rows in the full data grid.

As the final finishing touch, you can choose one out of four different ***search methods***, i.e. how you want OutBack to search for the text in the data grid.

All of the above search features are available on the search toolbar in OutBack:



The following section will describe all of the above in detail.

5.2 Search Columns

Unless you have specifically *selected* one or more columns, only the dedicated ***search columns*** will be included in any search you make. These columns can be defined by selecting menu item **Options | Search | Define Search Columns**. See Defining the Search Columns.

5.2.1 Defining the Search Columns

The **Define Search Columns** dialog box consists of two fields of columns. The left field contains all the columns that are not search columns, which usually covers the majority of the columns available in OutBack. The columns you see in the field on the right are the actual *search columns*. To transfer columns back and forth, simply select one or more columns by clicking their names (hold **Ctrl** or **Shift** to select several names at once) and then use the relevant direction button or . You

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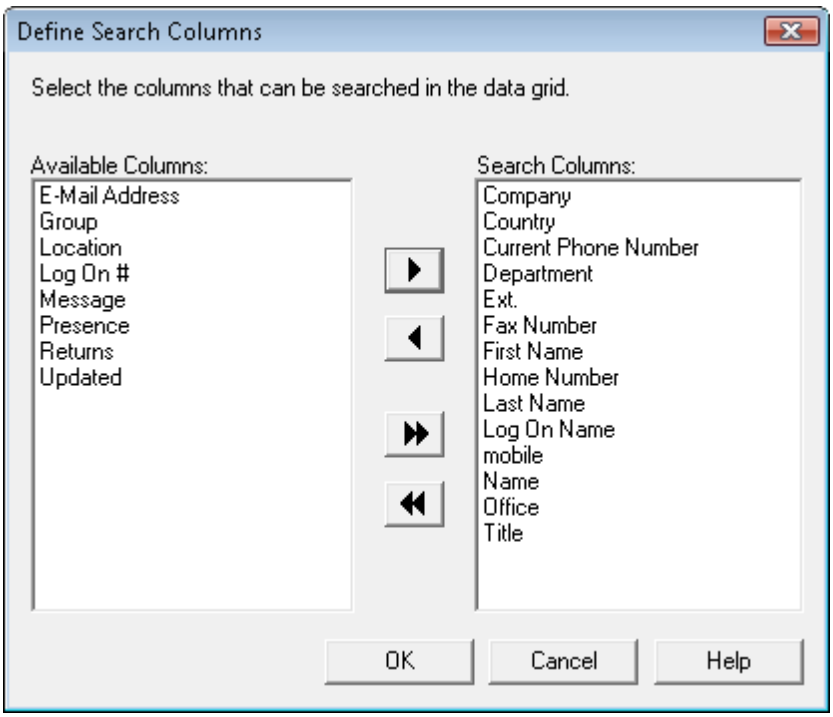
can also transfer a column name to the opposite list box by simply double-clicking it. Clicking or will transfer *all* column names.



Transfer those columns to the right field which you want to use for normal searching. If you have an idea that one or more of them won't always be relevant, you may want to leave them out and only search in them by selecting them prior to performing your search. The "normal" *search columns* will not be included when you search the selected columns. As soon as you hit **Esc** to remove these selections, the search columns are valid again.

When you have created a list of *search columns*, simply press **OK** and the change will immediately be saved and take effect.

5.2.2 Using the Search Columns

Each ***search column*** is indicated in the appropriate column header by a small looking glass icon. So if you have decided to use, say, **Name**, **Company** and **Phone Number** columns for this purpose, they will initially be displayed with a looking glass icon right next to the column names. This indicates that all three are now actively involved when searching. Thus, if you now type a search text, a row will be shown if just one of these three columns contains a match.

5.3 How the Search Result is Shown

Dynamic Updating of the Data Grid

Choosing How to Show the Search Result

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5.3.1 Dynamic Updating of the Data Grid

The default setting of OutBack is that the data grid is updated dynamically whenever you type the search text. This can be turned on or off in menu **Options | Search | Update Dynamically**. The difference is as follows:

- **When turned on** - as soon as you pause the typing of text in the search box, the data grid will be updated immediately to reflect the match.
- **When turned off** - pausing the typing in the search box will not update the data grid. You must hit Enter or press the Search toolbar button before this happens. This reflects the behavior as seen e.g. on the internet and in many other Windows applications.

5.3.2 Choosing How to Show the Search Result

The actual search result can be shown in two different ways, depending on how the **Shrink** check box is set on The Search Toolbar.

When the check box is **checked**, all user rows that match the search criteria will be the only ones displayed in the data grid. This can be used to show only the rows you want to see, for example if you search for a department name and only want to see the users from a certain department.

If you have enabled the dynamic update of the search, the data grid will reflect the search text as soon as you pause the typing. By correcting and adapting the search text, the data grid will constantly change the rows shown to match the text you have typed. When you are finished, simply hit **Esc** and the data grid will return to the original layout.

When the check box is **unchecked**, the search will not change the number of rows. Whenever you search for text in this mode, the matching user rows will merely be *selected*. This has other advantages compared to the previous layout in that you can immediately perform an action on the selected users - such as sending an e-mail, a ***notice***, or viewing their calendar appointments. Of course, there can be multiple selected rows spread all over a long list of users.

This mode is also where the *find next* and *find previous* keys (**F3** and **Shift+F3**) comes in handy. They work as in most Windows applications by selecting one row at a time that matches the current search text. By the end of the data grid, you are notified that no more rows match the search criteria. (The next and previous keys are of course also available in the **Shrink** mode, although The selection would only jump from row to row, as if you were using the cursor keys.)

5.4 The Search Methods

Specifying the location in column fields where a search should be matched is a useful feature. This is where the drop-down box on the search toolbar comes in:

Simply press the drop-down button and choose one of the ***search methods*** in the drop-down list to make it active. As long as you see the method in the box, this method will be in effect.

5.4.1 The Search Methods Available

The search methods are built-in and cannot be changed. Text will be searched according to the ***search method*** in all fields of the active ***search columns*** (or *selected* columns). The following **search methods** are available in OutBack:

- **Beginning of fields** - the search text will be matched to the beginning of each column field. So if you are searching for "**to**" and there are fields with "**To**m Jackson" and "Eric **To**mlinson", only "**To** m Jackson" will be found.

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- **Beginning of words** - the search text will be matched to the beginning of each word, even within individual column fields. So if you are searching for "**to**" and there are fields with "**To**m Jackson" and "Eric **To**mlinson", both will be found.
- **Whole words** - the search text you type must match whole words in the column fields. So if you have "**Jim** Peterson" and "**Jim**my Greene" and type "**Jim**", only "**Jim** Peterson" will match. All words within a field will be included in the search.
- **Anywhere in text** - this is the broadest search method and the one likely to give you the most hits. For example, if you search for "**im**" and have "J**im**my Greene" and "K**im** Morell", you will find both these users.

The above examples mention only user names, but the search text may of course apply to any of the fields in the columns involved in the search.

5.4.2 Advanced Searching Using Spaces

Depending on the ***search method*** chosen, you can improve the speed and efficiency of the search with the aid of *spaces*. For example, if you type "**to ja**" while the ***search method*** is set to **Beginning of fields**, the first "**to**" part will match against the first word in any of the fields. When found, OutBack looks for the "**ja**" part in *any of the following words within that field*. So if you have "**To**m **Ja**ckson" and "**To**mmy Robert **Ja**meson", you will find both of them with "**to ja**".

When the ***search method*** is **Anywhere in text**, typing "**k p**" will find all occurrences of separate words within fields where one word has a "**k**" somewhere and any other word a "**p**", even if this occurs in the opposite order. For example, "**k p**" will find all of the following fields; "Jac**k** S. **P** etersen", "Cas**p**er **K**. Farell", and "Har**p**er Zamors**k**i".

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VI Using Other OutBack Functions

Learning about All of OutBack's Functions
Setting an 'Alert' for a User
Sending a 'Notice' to one or more Users
Displaying OutBack Users According to Category
Column Groups
Using the 'Tracking' Feature

6.1 Learning about All of OutBack's Functions

The previous section discussed manipulating OutBack messages and searching, which for most users will be their primary (or perhaps even their only) usage of Merlinia OutBack. However, OutBack includes several other functions that you can read about in this section. You can read about:

- Setting an ***alert*** on a user so that you are made aware of it when that user changes his/her message.
- Sending a ***notice*** (a small message) to one or more users.
- Invoking your e-mail program (for example Microsoft Outlook or Lotus Notes) from OutBack and send e-mails or SMS messages to one or more users that have been selected in the data grid.
- Placing the OutBack users in several different categories and then select which group of users you want to display in OutBack.
- Placing columns in dedicated ***column groups***, either to remove unwanted columns or to gather columns with certain types of information.
- Requesting ***tracking***, so that the last changed message is highlighted in the data grid.

A general discussion of these OutBack functions is presented in this section, while detailed information about how to perform these functions can be found in the section The OutBack Menus.

6.2 Setting an 'Alert' for a User

You will typically want to use an ***alert*** in a situation where you want to talk to a co-worker who is not present at the moment. So you set an ***alert*** for this user so that when he/she comes back and clears his/her OutBack message (or changes the message) you will be made aware of this change in status.

In other words, when you have set an ***alert*** for a user, then OutBack watches for a change in this user's message or status, and when the change occurs the ***alert*** is triggered. OutBack then lets you know that an ***alert*** has been triggered.

6.2.1 Setting and Removing Alerts

Set alert *toolbar button*	To set an ***alert*** for one or more users you start by selecting them - see Selecting Rows and Columns. Then you use the menu item **Alert | Set Alert for Selected Users** or the shortcut keystroke **Ctrl+T** or the **Set alert** button on the toolbar. The pending ***alert*** status is indicated by OutBack displaying an unlit light bulb symbol ( ) in the **Presence** column for the user(s) in question .
	To remove an ***alert*** for one or more specific users you simply select the users

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Remove alert *toolbar button*	and then use the menu item **Alert | Remove Alert for Selected Users** or the shortcut keystroke **Ctrl+R** or the **Remove alert** button on the toolbar.
Remove alert for all users *toolbar button*	To remove ***alerts*** for *all* users you use the menu item **Alert | Remove Alerts for All Users** or the shortcut keystroke **Ctrl+Z** or the **Remove alert for all users** button on the toolbar.

Note that the toolbar button is dynamic, meaning that it will automatically display the most logical choice when dealing with ***alerts***. For example, when you select one or more rows in the data grid where none of them has an ***alert***, the unlit light bulb icon is shown to let you know that you can now set an ***alert***.

6.2.2 What Happens when an Alert is Triggered

When you have set an ***alert*** for a user, and that user changes his/her OutBack message or his/her status changes, then the ***alert*** is triggered. OutBack indicates this by changing the symbol in the **Presence** column from an unlit light bulb ( ) to a lit light bulb ( ) and then back again in a periodical manner. Also, the light bulb icon will appear in both the title- and the taskbar of the OutBack program when the ***alert*** is triggered.

To improve the chances of catching your attention even further, the internal speaker will also beep if you have the menu item **Options | Sound** | **Beep on Alert** turned **On** (which is the default setting).

In order to be able to see that OutBack's button on the Windows taskbar is blinking you should not hide the Windows taskbar.

Alternatively, in order to be able to see when the icon on OutBack's title bar is blinking you should arrange the various programs on your screen so that the top of OutBack's main window is visible at the top of your screen.

OutBack stops blinking the icon when you remove the ***alert*** in question.

6.3 Sending a 'Notice' to one or more Users

OutBack allows you to send a ***notice*** to one or more OutBack users that are online. An OutBack ***notice*** is a small text message that can be displayed in a simple window and contains at most 1000 characters.

You can also send an OutBack notice to all of the OutBack users that are currently online, in which case it is called a ***broadcast notice***.

An OutBack ***notice*** should only be used in situations where you want to send a small message that the recipient should react to immediately, or as soon as he/she returns to his/her desk. The OutBack ***notice*** feature is *not* intended to replace the in-company e-mail system. In particular, you should not use a ***notice*** instead of an e-mail in the following situations:

- If the message does not need to be acted upon immediately.
- If the message is long or complicated or needs attachments.
- If the recipient should be able to process the message or save it or forward it.
- If the recipient's PC is not currently online.

On the other hand, the OutBack ***notice*** feature is very suitable for small and simple messages that should be acted upon immediately by users who are currently online. For example you could send a

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notice saying "You have a visitor in the reception" to a co-worker who you know is online and at or near his/her desk. It is even possible to conduct a basic two-way communication, just like in a chat program.

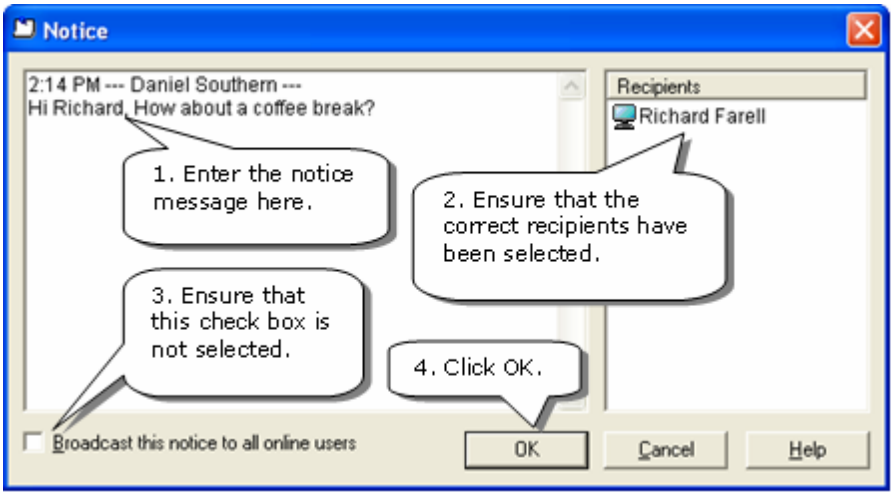
6.3.1 Sending an OutBack Notice

You can send an OutBack ***notice*** to one or more selected users, or you can send a ***broadcast notice*** to all of the OutBack users whose PC's are currently online.

Sending a Notice to Selected Users

Send Notice *toolbar button*	To send a ***notice*** to one or more selected users you must first select the users. See Selecting Rows and Columns. Then you use the menu item **File | Send Notice**, or the shortcut keystroke **Ctrl+S**, or click on the **Send Notice** toolbar button.

The following dialog box will now appears:


Notice
2:14 PM --- Daniel Southern ---
Hi Richard, How about a coffee break?
Recipients
Richard Farell
1. Enter the notice message here.
2. Ensure that the correct recipients have been selected.
3. Ensure that this check box is not selected.
4. Click OK.
Broadcast this notice to all online users
OK
Cancel
Help

As indicated above, you should now enter your ***notice*** message, check that the correct recipients were selected, ensure that the **Broadcast this notice to all online users** check box is not checked, and click on the **OK** button.

While entering the ***notice*** message you can use standard Windows editing techniques, including pasting text in from the clipboard by using **Ctrl+V**.

Incidentally, you can send a ***notice*** to yourself if you want. This may be useful if you are logged onto the system with multiple PC's and you want to send a reminder to yourself. The ***notice*** window will always be displayed on all of the PC's where you have logged on to OutBack.

*User will get **notice***	When you write a ***notice*** to the selected users, you can always see whether they are still online in the dialog box list. The status of the users is indicated using the same symbols you see in the data grid, and this too changes dynamically in the dialog box. If some of the users have gone offline before you have finished writing your ***notice***, you can still send it - but only the users that are still online will actually receive your ***notice***.

Sending a Broadcast Notice

If you want to send a ***broadcast notice*** to *all* of the users who are running OutBack, then it does not matter whether any rows in the data grid are selected or not. However, it is a slight advantage if *no*

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rows are selected because this means that the ***notice*** will be assumed to be a ***broadcast notice***. This can be achieved by hitting the **Esc** key before starting a ***notice***. In fact, if you invoke the dialog box in this way, you won't be able to alter the state of the check box - it will always remain **On**. When you write a ***broadcast notice*** there will not be a list of users in the right side of the dialog box, instead it will just state that you are now broadcasting to all.

To send a ***notice*** to everyone, just use the menu item **File | Send Notice**, or the shortcut keystroke **Ctrl+S**, or the **Send Notice** button on the toolbar. Then check the **Broadcast this notice to all online users** check box.

Note that when the **Broadcast this notice to all online users** check box is **On** then the **Recipients** field in the above dialog box disappears.

Remember that only OutBack users whose PCs are online will receive this ***broadcast notice***. Incidentally, you will always receive the message yourself. In contrast to when sending a ***notice*** to selected users, you will not be told if there were users offline when broadcasting to all.

When sending a broadcast, a confirmation dialog box will appear to prevent you from accidentally sending a notice to all employees.

6.3.2 Receiving OutBack Notices

Whenever you receive an OutBack notice it will be displayed in a new window on your screen. In this dialog box you can see who sent it and when it was received. To make the notice window disappear you should click on the **Close** button or hit **Enter** or **Esc**.

However, it is also possible to press the **Reply** button in order to conduct a two-way communication with the sender. Before doing this you can choose if you want to include the previous text in the answer (just like in a common chat program) so that each side can see the course of the discussion. This is done with the check box **Include this text in reply**. It is checked by default. When you press the **Reply** button, the OutBack reply box is closed and replaced with the dialog box used to write a new ***notice***. Here you can see the course of the discussion (if you chose to keep it), and you can see the name of the recipient in the right side of the dialog box.

Note that it is not possible to reply to more than one person at a time.

To improve the chances of catching your attention, the internal speaker may beep. This happens if you have the menu item **Options | Sound | Beep on Received Notice** turned **On** (which it is by default). See **Options | Sound** for more information.

Incidentally, the text in an OutBack ***notice*** window can be selected with the mouse cursor and copied to your Windows clipboard by using **Ctrl+C**.

The ***notice*** window will be displayed by OutBack in one of three different ways, depending on the setting of the menu **Options | On Received Notice**.

Options | On Received Notice | Show as OutBack Window

When this option is in effect a received notice is displayed in a window that is at the same "depth" on the screen as OutBack itself. This means that if you have one or more other programs "on top of" OutBack on your screen then the notice message window will also be covered by the other windows and you will not be aware of it.

This symbol will be animated in the system notification area.	If you choose this option (perhaps because you do not like having OutBack notice windows popping up unexpectedly), then you will still be made aware of a ***notice*** showing up because an OutBack symbol in the system notification area will animate an image of a piece of paper.

Options | On Received Notice | Show as Top Window without Focus

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This is the recommended and default setting for the **Options | On Received Notice** menu. With this setting in effect a received notice is displayed in a window that is "on top of" all of the other windows on your screen, so you cannot avoid seeing it. At the same time, the fact that it is "not in focus" implies that it is not the "active window", and that means that even if you are busy typing when the notice window is displayed it will not interfere with your typing.

Options | On Received Notice | Show as Top Window with Focus

With this setting in effect a received notice is displayed in a window that is "on top of" all of the other windows on your screen, so you cannot avoid seeing it. This window is also "in focus", which implies that it is the "active window". This means that you can close the window (without activating it) by hitting the **Enter** or **Esc** key.

Use of this option is not recommended because the notice window can interfere with your interaction with another program. For example, if you are busy typing when the notice window pops up, and if you happen to type an **Enter** or an **Esc** character before you realize what has happened, then you will close the notice window before you get a chance to read it.

6.4 Displaying OutBack Users According to Category

If there are only a few OutBack users in your company then you probably prefer to have all of them displayed in the data grid all of the time. But as soon as there are more than approximately 20 users you will probably prefer to use OutBack's features to place the various users in different categories. By doing this you can determine which users you want to see in the data grid under various circumstances.

This feature is especially useful for the receptionists and/or the telephone switchboard operators. For example, the receptionist can place all of the sales personnel in one category and all of the technical support personnel in another category, and can then quickly select which group of users he/she wants to see displayed.

6.4.1 Placing an OutBack User in a Category

You can place each OutBack user in various categories:

- **Ignored** users are normally not displayed at all.
- All **Special 1** users can be displayed together by themselves.
- Similarly, all **Special 2** users can be displayed together by themselves.
- Users who are not in the **Ignored**, **Special 1** or **Special 2** categories are considered to be **Normal** users.

To place one or more users in the **Ignored**, **Special 1** or **Special 2** categories you must first select the users (see Selecting Rows and Columns) and then use one of the following menu items:

- **Users | Ignore Users** marks the users as type **Ignored**.
- **Users | Special 1 Users** marks the users as type **Special 1**.
- **Users | Special 2 Users** marks the users as type **Special 2**.

Note that these three menu items are actually "toggle switches", in that they are also used to *remove* the selected users from the specified category, if they are already in that category. You can also see from the check mark on the menu item itself whether one or more of the selected users are already in the indicated category.

You may want to sort the data grid according to one of the columns, such as **Department**, before you select the users to be placed in a certain category. This is described in Sorting the Grid by Column(s).

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You may also want to apply different colors to the users who are in different categories. This can be done using the following menu items:

- **Options | Colors | Special 1 Background Color**
- **Options | Colors | Special 1 Text Color**
- **Options | Colors | Special 2 Background Color**
- **Options | Colors | Special 2 Text Color**

Note that the **Ignored** category may be combined with the **Special 1** or **Special 2** categories. In other words, a user can be both **Ignored** and **Special 1**. The **Special 1** and **Special 2** categories cannot be combined, however.

The current user category for each user can be seen in the **Group** column, as described under *Group Column* in Description of Selected Data Grid Columns. If a particular user is not being shown when you expect him or her to be, you can check which categories he or she is a member of by selecting the menu item Users | Show All Users and then take a look at the **Group** column.

6.4.2 Displaying the Users According to Category

Once the OutBack users have been placed in the correct categories, you can decide which group of users you want to display in the data grid. This is done via the **Users** menu, or via the associated shortcut keystrokes.

The following display modes are available:

- The menu item **Users | Show All Users** or the shortcut keystroke **Ctrl+U** can be used to display all of the users in the data grid, *including* those who are in the **Ignored** category.
- The menu item **Users | Show Normal** or the shortcut keystroke **Ctrl+M** be used to show all users *except* those who are in the **Ignored** category. This is the default situation.
- The menu item **Users | Show Ignored Users** or the shortcut keystroke **Ctrl+I** can be used to show *only* those users who are in the **Ignored** category. This includes those that are also in the **Special 1** or **Special 2** categories.
- The menu item **Users | Show Special 1 Users** or the shortcut keystroke **Ctrl+Q** can be used to show *only* those users in the **Special 1** category.
- The menu item **Users | Show Special 2 Users** or the shortcut keystroke **Ctrl+W** can be used to show *only* those users in the **Special 2** category.
- The menu item **Users | Show Available Users** or the shortcut keystroke **Ctrl+L** can be used to show *only* those OutBack users that are currently available, i.e. have not set an OutBack message and are online. In other words, only those that are showing the and icons in the **Presence** column. This view mode is dynamic in that users that change their status will affect which user rows are actually displayed.
- The menu item **Users | Show Selected Users** or the shortcut keystroke **Ctrl+G** can be used to show *only* those users, you selected in the data grid prior to pressing the button. This can be a great help to quickly create a reduced list of users that have something in common.

All of the above menu items display a check mark beside the menu item itself when that particular display mode is in effect.

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6.5 Column Groups

Even though the IT Department may have limited the amount of columns available in OutBack, there may still be a considerable amount. It can be an advantage to have some sort of grouping, and this is exactly what ***column groups*** were created to handle.

By using ***column groups*** you can have several views of certain columns, either to leave out unwanted columns or to create specialized views with certain information - such as e.g. phone numbers for one group and addresses for another. All this is possible with ***column groups***.

Everything regarding ***column groups*** can be managed in one single toolbar located in the top of the window:

6.5.1 Selecting Column Groups

Selecting a *column group* is done from the drop-down box in **The Column Group Toolbar**.

Press the drop-down button and choose one of the *column groups* in the drop-down list to make it active. As long as you see the group in the box, this group will be active.

6.5.2 Showing Column Groups

Whether you see all columns or only the columns belonging to a specific group can be set by two buttons on the toolbar that can change the *view mode*:

Show Column Group

Press this button to show only the columns belonging to the column group currently selected in the drop-down box.

Show All Columns

When pressed, all columns in OutBack are shown, and the text in the drop-down box changes color for all the columns in the data grid that belongs to the selected column group. The appropriate column headers will also share the same color.

The two buttons always select one out of two *view modes*. Because of this, one of them will always be pressed down to indicate that you already are in this view mode. In other words, the buttons somewhat resembles toggle switches.

The choice of other column groups in the drop-down list will respect the current *view mode*. In other words, if you select another ***column group*** while **Show Column Group** is active, the view will change immediately to show only the columns in the newly chosen group. If **Show All Columns** is enabled, choosing a new ***column group*** will still show all columns in the data grid, but the column header colors will change to reflect the new group.

The color of the ***column group*** headers seen in the **Show All Columns** view mode can be adjusted with menu item **Options | Colors** | **Column Group Text Color**.

6.5.3 Managing Column Groups in the Data Grid

Show All	In order to manage which columns are part of a ***column group***, it is generally a good idea to switch to the **Show All Columns** *view mode* first by pressing the

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Columns *toolbar button*	dedicated toolbar button.

While you are in **Show All Columns** *view mode*, you can add or remove columns for any ***column group***. The following list shows you how to do this:

1. Right-click the column header of a column whose relationship to one or more ***column groups*** you wish to change. This will show a context menu with a list of all the ***column groups*** available in OutBack now.
2. When a check mark is seen beside a ***column group*** name on the context menu, it means that this column is a member of that ***column group***. Select a name now to toggle it - if it was a member, it isn't any longer - and vice versa. If you want to toggle more than one ***column group*** for the same column, you have to right-click the column each time. Note that if you are toggling the same ***column group*** name as the one currently selected in the drop-down box, the color of the column header will change accordingly to reflect the new relationship.
3. It is possible to add or remove a whole cluster of columns in one step. Start by selecting several columns at once and then right-click one of the selected columns. Any change to the ***column group*** ownership here will then immediately affect all of the selected columns.

6.5.4 Managing Column Groups using the Dialog Box

Edit Column Groups *toolbar button*	Managing column groups using the dedicated dialog box may be a lot easier than by doing it directly in the data grid. Furthermore, it is the only place where you can *delete* or *create* column groups. To open the dialog box you must press the **Edit Column Groups** button on the toolbar.

There are two main sections in the dialog box. The left section is used to create, delete, rename and select ***column groups***. The entire right side (consisting of two list boxes) is used to add or remove columns to or from the ***column group***, you have selected in the left section. The two list boxes in the right section dynamically changes their contents according to what ***column group*** you select in the left section.

Editing the column groups

All ***column groups*** in OutBack are always shown in the left section when you open the dialog box. The dialog box offers the following options:

- Press the **New** button to create a new ***column group***. The new groups is always named "New group" and does not contain any columns by default. Type in a new name for the group in the edit box. After this, you can select the columns in the right section (refer to Selecting Rows and Columns for information about how this is done). When you press **OK**, the new group will be available in the drop-down box on the ***column groups*** toolbar.
- You can select an existing ***column group*** in the list box and press **Delete** to remove it. When you press **OK**, the group will be removed from the drop-down box on the ***column groups*** toolbar.
- You can always select an existing ***column group*** in the list box and change its name in the edit box. *Note that it is not possible to have two* ***column groups*** *with the same name.*

Note*: that if you create a group but do not add any columns to it, it will automatically be removed the next time you start OutBack.*

Selecting columns for a column group

As soon as you have selected the ***column group*** in the left section you want to edit, you can use the two list boxes in the right section. The left list box here contains all the columns *not* included in

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the ***column group***, where the columns in the right hand side list box contain those that are included. To transfer columns back and forth, simply select one or more columns by clicking their names (hold **Ctrl** or **Shift** to select several names at once) and then use the relevant direction button or . You can also transfer a column name to the opposite list box by simply double- clicking it. Clicking or will transfer *all* column names to the opposite list box.

When you are satisfied with the selection of columns for the relevant ***column group***, you either select a new ***column group*** and repeat the procedure, or you can press **OK** to accept the changes.

*Note that all changes to the contents of **column groups** happen instantly. If you are showing the same **column group** in the data grid which you are editing in the dialog box, you will immediately see the changes in the data grid.*

6.6 Using the 'Tracking' Feature

The ***tracking*** feature is intended primarily for receptionists and telephone switchboard operators. It causes OutBack to continuously highlight the data grid rows for the user(s) whose message or status has just changed.

The ***tracking*** feature highlights all changes to rows in the data grid, both new messages, clearing of messages or changes in online status.

You can specify the number of rows in the data grid that are marked by the ***tracking*** feature. For example, if you specify that only one row is to be marked then only the most recently changed row is highlighted. If you specify that three rows are to be marked, then the most recent, the second-most recent and the third-most recent changes to messages or status will always be highlighted.

The Options | Tacking Menu

The ***tracking*** feature is controlled by the **Options | Tracking** menu. This menu has the following two menu items:

Options | Tracking | Track Last Changed Messages

This menu item is used to turn the ***tracking*** feature **On** or **Off**. The current status is indicated with a check mark that is shown beside the menu item itself.

Options | Tracking | Change Number

This option sets the number of rows that are tracked when the ***tracking*** feature is in effect. For example, if the number is set to 5 then the last five changed rows in the data grid are shown in the unique colors used to display recently changed rows.

Specifying the color of the tracked rows

The way in which OutBack highlights the last changed rows in the data grid is by displaying them in unique colors. You can modify the colors used to display these rows by using these menu items:

- **Options | Colors | Last Changed Message Background Color**
- **Options | Colors | Last Changed Message Text Color**

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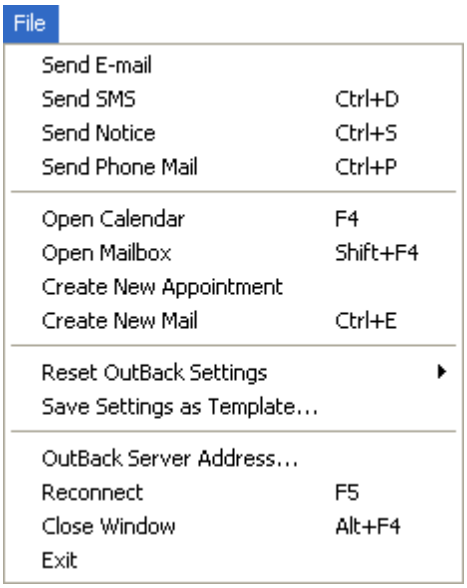
VII The OutBack Menus

File Menu
Edit Menu
Message Menu
Telephone Menu
Users Menu
Alert Menu
Options Menu
Help Menu

7.1 File Menu

OutBack does not work with user-specified files, so the **File** menu does not really have anything to do with files. Instead it is used for some of the significant menu items that do not fit into the other top-level menus.



7.1.1 File | Send E-mail

In short this action starts the default e-mail client and fills out the **To** field with the e-mail address (es) for the selected user(s) in the data grid.

If no users are selected, the e-mail client will still be invoked but the **To** field will be empty.

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7.1.2 File | Send SMS

This menu item allows a user to send an SMS message to a cell phone. This functionality requires that your company has an SMS gateway set up, which is capable of forwarding the message to the cell phone.

You can only send an SMS to one recipient at a time. If you select multiple recipients in the data grid, only the first one selected will receive the message.

Once you select **File | Send SMS**, press **Ctrl+D** or click on the button on the toolbar, a dialog box is displayed. Here you can enter a mobile phone number (if the person you selected in the data grid has a mobile number, this will be displayed as the default number) or edit the existing. You of course also enter the **Message text**, and finally you can select a "signature" (the recipient will see the number of the company SMS gateway as the sender).

Note that the maximum number of characters in an SMS message are 160 - the number of characters you have left to write your message is displayed at the bottom of the dialog box.

7.1.3 File | Send Notice

This menu item is also represented by a toolbar button on the main toolbar.

Send Notice toolbar button

Selecting this menu item results in sending a notice message to one or more OutBack users. This menu item can also be used to send a broadcast notice to all OutBack users whose PC's are currently online. The notice feature is described in Sending a 'Notice' to one or more Users.

7.1.4 File | Send Phone Mail

This menu item allows a user to send a message to a cell phone. This functionality requires that your company has an SMS gateway set up, which is capable of forwarding the message to the cell phone.

7.1.5 File | Open Calendar

Only works with Microsoft Outlook or IBM Lotus Notes.

This menu item is also represented by a toolbar button on the main toolbar.

Open Calendar toolbar button

File | Open Calendar can be chosen after you have selected one or more users in the data grid. If you are allowed to view the other users' appointments in your calendar program, the appropriate calendar(s) will appear. This can be of great help when determining whether a user will be available at a given time.

7.1.6 File | Open Mailbox

Only works with Microsoft Outlook or IBM Lotus Notes.

This menu item works in a very similar way to opening a calendar (**File | Open Calendar**); here it opens a mailbox instead.

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7.1.7 File | Create New Appointment

Only works with Microsoft Outlook or IBM Lotus Notes.

This menu item is also represented by a toolbar button on the main toolbar.

Create New Appointment toolbar button

If you select one or more user(s) in the data grid and then select this menu item, you will open an appointment form where the selected users are automatically added to the list of invited attendees.

If no users are selected, the appointment form will still be invoked but nobody will be invited to begin with. You are always included yourself, however.

7.1.8 File | Create New Mail

Only works with Microsoft Outlook or IBM Lotus Notes.

This menu items works a lot like **File | Send E-mail**. In fact, you probably won't see any difference when alternating between the two. The menu item pre-fills the **To** field with the e- mail addresses of the selected users.

If no users are selected, the e-mail form will still be invoked but the **To** field will be empty.

The difference between the two seemingly similar menu items is as follows:

- **File | Send E-mail** - the standard Windows "Mailto:" technique is used, meaning that it will work with almost all mail clients you may have installed - not just Microsoft Outlook or Lotus Notes.
- **File | Create New Mail** - this only works with Microsoft Outlook or Lotus Notes and invokes the e-mail form directly. Also, this menu item is represented as a toolbar button on the main toolbar.

7.1.9 File | Reset OutBack Settings

This menu item resets the current client setting to predefined settings saved in a file. Client setting include such things as color choices and item and column groups. A file containing the predefined setting is called a template. A default template is generated when the OutBack Server is configured.

7.1.10 File | Save Settings as Template

This menu item lets a user save the current settings of the client configuration to a template file. The template file can be used in the menu item **File | Reset OutBack Settings** to load the saved configuration at another time.

7.1.11 File | OutBack Server Address

This menu item enabled a user to choose with OutBack server the client should connect to. Usually this value is configured when the client is installed, and should not need to be altered again. If there are more OutBack servers running in the organization the user can choose the appropriate server.

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7.1.12 File | Reconnect

This menu item should not normally be needed. It is used to reestablish the network connection between your OutBack Client program and the OutBack Server program.

Note that the menu item removes all of the ***alerts*** you may have set.

7.1.13 File | Close Window

Use this menu item (or press **Alt+F4**) if you want to hide the OutBack window and the button on the taskbar, but still want to leave the program running. This can be useful since OutBack isn't always used actively and may be in your way. However, OutBack has to be active on your computer so that other users can see that you are available. Selecting this menu item corresponds to clicking the cross icon in the top right corner of the OutBack window.

After OutBack has been "hidden", you can activate it again with the aid of the OutBack icon in the system notification area.

7.1.14 File | Exit

This menu item causes the OutBack Client program to terminate. Not even the icon in the system notification area will be available. You should normally not use this because the whole idea behind OutBack is that it should run all of the time on all of the PC's on which it is installed.

If you have previously selected the **Options | On Log Off | Show Set Message Dialog** menu item (or if it is selected by default), then using **File | Exit** will result in you being prompted to enter a new OutBack message before OutBack terminates.

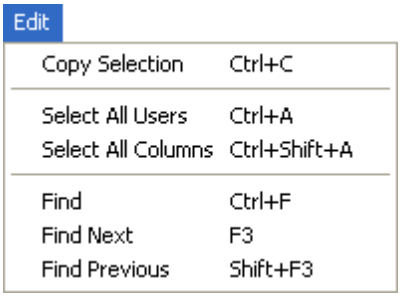
If you accidentally stop OutBack and want to start it again, then click on the Windows **Start** button and then select **All Programs | Merlinia | Merlinia OutBack 4.0 | OutBack Client**.

Important note if you're running on a Terminal- or Citrix server

If OutBack is running on a *Terminal or Citrix Server*, it is important that you **always log off in the server window rather than disconnect!** If you merely *disconnect*, OutBack will still be running, and thus everyone in the company will not know that you are in fact *offline*.

7.2 Edit Menu

All menu items related to editing have been placed in this menu, including search and browsing functions.



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7.2.1 Edit | Copy Selection

This can be used to copy information from OutBack to the clipboard, after which the information can be pasted into any other Windows program - e.g. Excel.

If you have selected one or more users (i.e. rows), all available information for these users will be placed on the clipboard. The same goes for selected columns.

The data is separated by tabulator characters and should be immediately editable in spreadsheets or other applications.

7.2.2 Edit | Select All Users

This menu item selects all users that are immediately visible in the data grid. So if you select this while viewing "**Special 1"** users and then return to a *view mode* where all users are seen, only the " **Special 1"** users are still selected.

7.2.3 Edit | Select All Columns

This menu item selects all columns in the data grid. Just like Edit | Select All Users it works in combination with the current *view mode*. So if you select all columns while viewing a certain ***column group*** and then press the **Show All Columns** button to view all columns, only the columns in the ***column group*** are still selected.

7.2.4 Edit | Find

This menu item works exactly as if you were pressing the **Search** button on the search toolbar. Selecting it while the search edit box is empty will place the cursor in the edit box, ready for you to type the search text. If there already is text in the edit box, however, the search will be performed immediately.

Please refer to Searching the Data Grid for extensive information about the powerful search capabilities of OutBack.

7.2.5 Edit | Find Next

The menu item will find the next row that matches the current search criteria.

Although this menu item is available during any search you make, it is most useful when you have chosen to have the search result shown as selected rows rather than reduced rows (by checking the **Shrink** check box).

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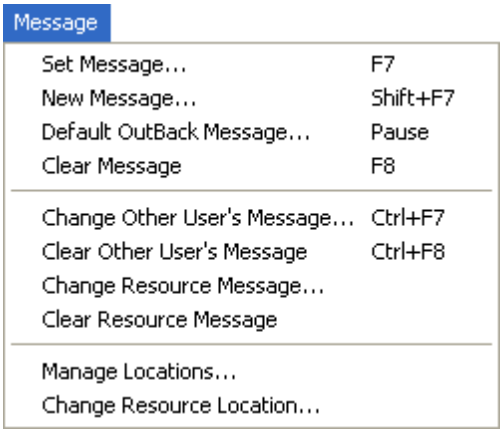
7.2.6 Edit | Find Previous

Works just like the previous menu item (Edit | Find Next), only here it browses backwards - i.e. towards the top of the data grid, finding the previous user row that matches the current search criteria.

7.3 Message Menu

This menu is primarily used to set and clear OutBack messages. See OutBack Messages for a general discussion about OutBack messages. The menu is also used to manage *locations*.



7.3.1 Message | Set Message

Set Message *toolbar button*	When you haven't set an OutBack message, the menu item is also available as a toolbar button on the main toolbar. This menu item causes the **Set Message** dialog box to appear in *simple mode*, so that you can set one of the stored OutBack messages. The *simple mode* of the dialog box is described extensively in The Simple Mode.

7.3.2 Message | New Message

When you select this menu item, the **Set Message** dialog box opens in advanced mode and automatically prepares a new message for you to edit. See more in the section The Advanced Mode.

7.3.3 Message | Default OutBack Message

Default OutBack Message *toolbar button*	This menu item is also represented by a toolbar button on the main toolbar. **Message	Default OutBack Message** works exactly as if you pressed the global **OutBack** key. This is a special hotkey that may set the most common OutBack message, no matter what program you have activated in Windows.

Please refer to Setting a Message via the Global OutBack Key for more information about this.

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7.3.4 Message | Clear Message

Clear Message *toolbar button*	When you have currently set an OutBack message, the menu item is also available as a toolbar button on the main toolbar. This menu item clears your current OutBack message, sets the **Updated** field to the current time, resets the **Returns** field (the *return time* value) to blank, and sets the **Online** symbol to - thereby indicating that you are available.

7.3.5 Message | Change Other User's Message

This menu item can be used to change another user's OutBack message. It is meant for use by the receptionist or telephone switchboard operator, and can be used when an employee telephones the office and says that he/she is sick or will be coming back to the office later than expected. It can also be used in situations where an employee has gone on vacation and forgot to set a "holidays" message when he/she went home on the last day before the vacation.

When an OutBack message is set using the **Message | Change Other User's Message** menu item, the result is exactly the same as if the user set the message him/herself, except that a bit of extra text is added to the message indicating who set it. For example, if the receptionist's name is Greta Seagal, then a message that she sets on behalf of another user will have the text "(Ref. Greta Seagal)" added to it. Also, if the message you set is meant to open a message window or activate the screen saver, this will in fact happen on the user's machine (if it is currently switched on and is running OutBack).

Only users who have OutBack administrator privileges can use this menu item. See the online help in the *Merlinia OutBack Administrator* program for information about how user privileges are assigned.

7.3.6 Message | Clear Other User's Message

This is another menu item, which is only available to users with administrator privileges such as the receptionist, who need to be able to set messages for other users. This command will simply allow the user to clear the message of one or more users, leaving no trace of the ("Ref.") string that may or may not have been attached to the original message.

In contrast to the previous menu item, this command may clear the messages of several users in one go. However, since this can be such a far-reaching task, a confirmation dialog box will always appear when trying to clear the message of more than one user.

Only users who have administrator privileges can use this menu item. See the online help in the *Merlinia OutBack Administrator* program for information about how user privileges are assigned.

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7.3.7 Message | Change Resource Message

It makes it possible to change a message for a resource directly without setting your message at the same time. This can be relevant if there is a meeting in a meeting room, but none of the participants have remembered to set the message for the resource. The receptionist can now do it for them.

Select a resource in the data grid and choose the menu item. A reduced version of the **Set Message** dialog box will show up. This version saves its own set of messages only used by resources. Furthermore, you can only access the **Message** tab, along with the **Information** tab so that you can check why an error might occur while editing a message.

The use of the reduced dialog box works in much the same way as the standard version of the dialog box. Because of this, you should refer to OutBack Messages for information about how to create, save and set messages.

Only users who have administrator privileges can use this menu item. See the online help in the *Merlinia OutBack Administrator* program for information about how user privileges are assigned.

7.3.8 Message | Clear Resource Message

The command makes it possible to clear the message for one or more resources.

The menu item works in much the same way as the menu item **Message | Clear Other User's Message**, only here you select resources in the data grid instead of users. Since clearing the message for several resources can be such a far-reaching task, a confirmation dialog box will always appear when trying to clear the message of more than one resource.

Only users who have administrator privileges can use this menu item. See the online help in the *Merlinia OutBack Administrator* program for information about how user privileges are assigned.

7.3.9 Message | Manage Locations

This dialog box is used to define a set of standard locations and phone numbers, which can be attached to the messages in the **Set Message** dialog box. This is also where you can define the location and phone number for when you haven't set a message. Apart from standard location and phone number, it is also possible to define an action to be set on your telephone, but only if your company is using one of the phone systems listed in Supported PBXs

The predefined locations and phone numbers you can select in the **Set Message** dialog box (more precisely in the **Location** tab) are defined in the dialog box you see, when you select the menu item **Message | Manage Locations**. This is also where you can define the standard location and phone number to be displayed in the data grid when you *haven't* set a message.

The dialog box looks like this:

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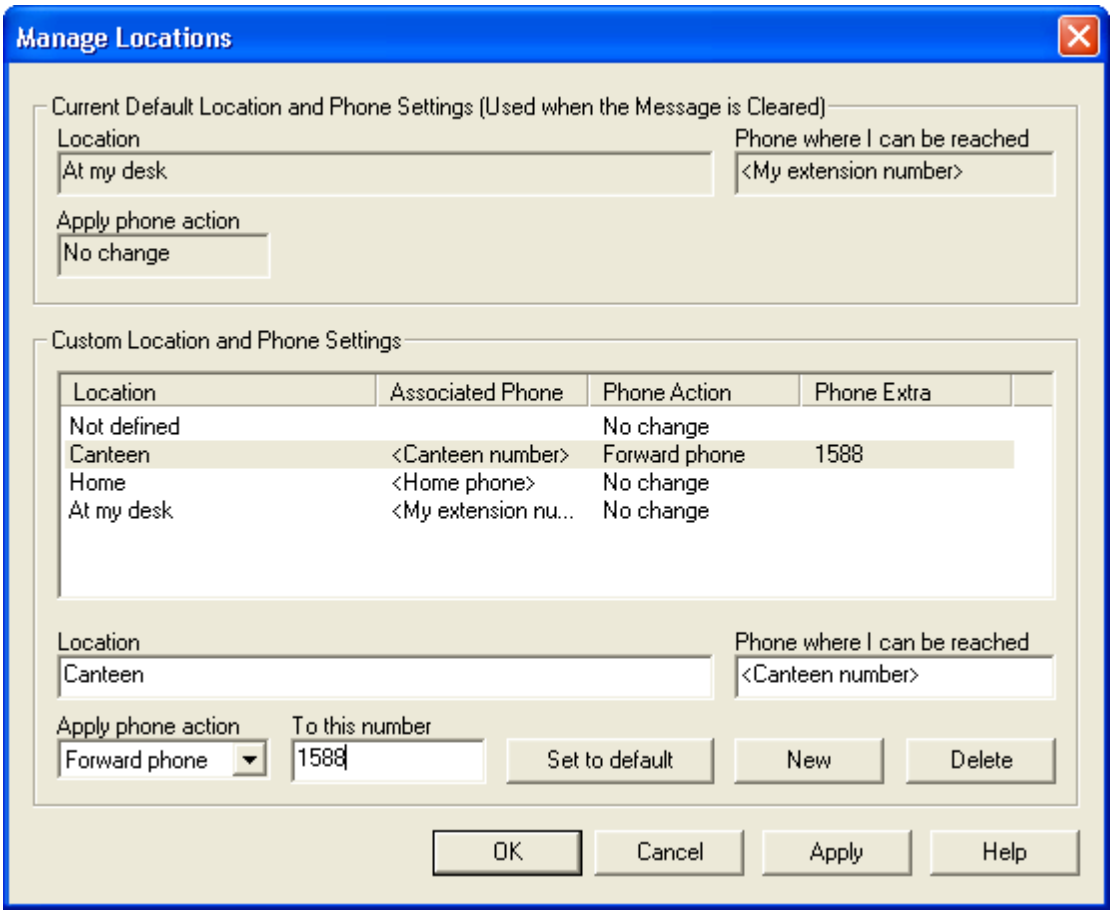

The locations and phone numbers defined here will be available in the drop-down box **Predefined settings selection** in the **Location** tab whenever you enter the *advanced mode* of the **Set Message** dialog box. As soon as you select one of the items in this drop-down box, you will automatically preset the other boxes in the same tab, thereby saving you some work.

See How the Elements of the 'Location' Tab Work for more information about this tab.

The predefined locations and phone settings are added to the list box by using the fields and buttons just below it, which are also used to edit them.

1. To edit an existing item in the list box, click it. All the fields below will now be pre-filled so that you can edit them. If you would rather create a new item, first press the **New** button and then type in the correct information in the boxes.
2. In the edit field **Location** you type in where you are, when this location is used.
3. In **Phone where I can be reached**, you type in the phone number where you can be reached when you actually find yourself in that location. This can be fixed line, a mobile phone, or you can write that you have no phone there by typing in "None" or "N/A".
4. If your company is using one of the phone systems listed in Supported PBXs, you can utilize the **Apply phone action** drop-down box.
   No change - nothing is done with the telephone here. However, this also means that any action that may already be in effect on the telephone won't be reset.
   Clear phone - the telephone will always be reset when this item is used.
   Do not disturb - the telephone will be set to reject all calls, thus you will not be disturbed.
   Forward phone - when this action is selected, an extra **Phone number** edit field will appear. Type in the number you want to forward to. The number will also appear in the **Phone Extra**

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column in the list box.

5. As soon as you have edited the item, you can press **New** again to create a new item in the list box, or you can select another item to edit it. When you are finished, you can press **OK** to save and close the dialog box.

Defining a default location and phone number

OutBack also offers the option of showing a location and phone number for when you *haven't* set a message, i.e. every time you clear your message. In other words, this will indicate where you are when you are available, and what phone number is in effect in this situation. To utilize this, you simply have to select an item in the list box (or make a new one with the **New** button) and then press the **Set to default** button. The information will now be copied to the gray boxes in the top of the dialog box. These cannot be edited, but only serves as information.

Note that this dialog box is the only place where you can define a default location and phone number for when you haven't set a message. This cannot be done in the **Set Message** dialog box.

As soon as you have selected a default location and phone number and press **OK**, OutBack will tell the OutBack Server about it. This means that the information will also be available on other OutBack Clients. However, this does not apply to the other items in the list box which are only saved in your local configuration.

7.3.10 Message | Change Resource Location

Just like a user may have a specific *location* and *phone number* in the data grid, a resource may also include it. Select a resource in the data grid then choose menu item **Message | Change Resource Location** to open a dialog box where you can type in the location and phone number for the relevant resource. If this information was already in place, the text will appear in the edit boxes ready to be edited. In the title bar, you can always see the name of the resource you are currently editing. Press **OK** when you are finished.

The location will now be visible in the **Location** column, and the phone number will be visible in the **Current Phone Number** column.

Note that it is not possible to change the location and phone number for a resource by using the **Set Message** dialog box.

7.4 Telephone Menu

This menu is only functional if OutBack has been integrated with the one of the phone systems listed in the section Supported PBXs. It controls the aspects of OutBack that has to do with the PBX integration. CBS stands for Computer Based Switchboard.

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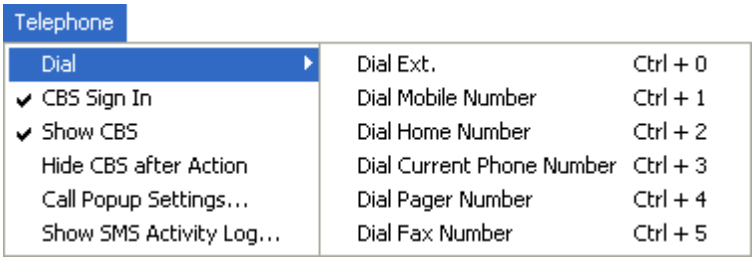
7.4.1 Telephone | Dial

This menu item lets a user dial another OutBack user, without having to manually dial the user's number. This functionality is only available if your company has OutBack integrated with one of the phone systems listed in Supported PBXs.


Telephone
Dial
CBS Sign In
Show CBS
Hide CBS after Action
Call Popup Settings...
Show SMS Activity Log...
Dial Ext. Ctrl + 0
Dial Mobile Number Ctrl + 1
Dial Home Number Ctrl + 2
Dial Current Phone Number Ctrl + 3
Dial Pager Number Ctrl + 4
Dial Fax Number Ctrl + 5

The user can be called on the relevant number by using the menu or one of the hotkeys assigned to the user's phone numbers.

7.4.2 Telephone | CBS Sign In

This menu item is used for logging in as a telephone switchboard operator. Note that a log on will use a CBS license. There are a limited number of these licenses available and you should not use the CBS Sign In unless you need to. License usage can be determined using the OutBack server administrator.

7.4.3 Telephone | Show CBS

When this menu item is selected you will see the user interface of the CBS program at the bottom of the screen. Note that the "minus" key on the numerical keypad allows you to shift the focus back and forth between the OutBack and the CBS window.

The CBS program is used for receiving and handling incoming calls.

7.4.4 Telephone | Hide CBS after Action

When this menu item is selected, the CBS window will be hidden after each use.

7.4.5 Telephone | Call Popup Settings

Use this dialog box for customizing the handling of incoming calls.

If selected, the **Bring OutBack to front if you receive a redirected call** option will make OutBack visible when a call is redirected to your phone. The person, whose call is being redirected, will be highlighted so that his or her calendar can be easily opened.

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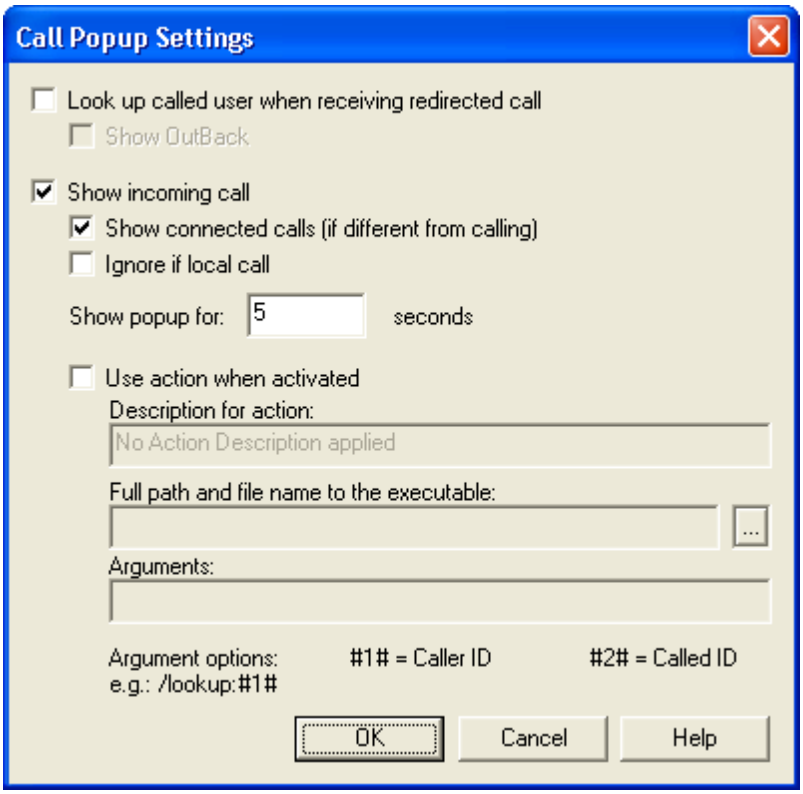

If selected, the **Show incoming calls** option will show a popup for the specified number of seconds. If a call originates from a local extension number you can choose to not get a popup by selecting the **Ignore if local call** option.

If selected, the **Use action when activated** option will allow you to execute a pre-selected action by clicking on the popup. The action has to be defined by a **Description for action**, the **Full path and file name to the executable** and **Arguments**. The program can be given either the "Caller ID" or the "Called ID" as an argument.

7.4.6 Telephone | Show SMS Activity Log

This menu item activates the SMS activity log dialog box, where the status of your sent SMS messages can be seen. Only relevant if the Merlinia SMS Gateway has been installed.

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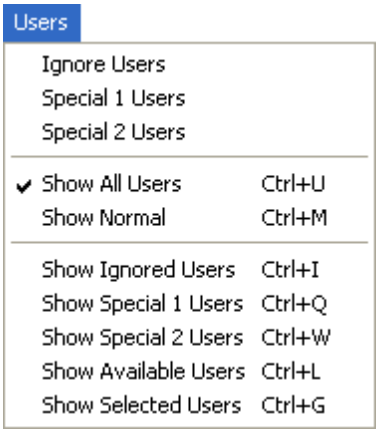
7.5 Users Menu

The **Users** menu is used to specify which category users are placed in, and which *display mode* is to be used. The *display mode* determines which user categories are displayed in the data grid. See Displaying OutBack Users According to Category for more information.



7.5.1 Users | Ignore Users

This menu item is used to "hide" or "unhide" OutBack users. Hidden (or ignored) users are not displayed in the data grid, except when you select **Users | Show All Users** or **Users | Show Ignored Users**.

To hide one or more users first select the users to be *ignored* - see Selecting Rows and Columns. Then use the **Users | Ignore Users** menu item.

"Showing" the users is a bit more complicated, but is done as follows:

1. First use the **Users | Show Ignored Users** or **Users | Show All Users** menu item, so that the hidden users are displayed.
2. Select the users that should no longer be *ignored* - see **Selecting Rows in the Data Grid** in the Selecting Rows and Columns section.
3. Use the **Users | Ignore Users** menu item. This toggles the *ignored* status. You can always see if you are removing or adding the selected users by taking a look at the check mark next to the menu item.
4. Use the **Users | Show Normal** menu item to return to normal *display mode*.

7.5.2 Users | Special 1 Users

This menu item is used to place one or more users in the *Special 1* category, or if they are already in that category, to remove them from that category.

To do this, first select the relevant users - see Selecting Rows and Columns. Then use the **Users | Special 1 Users** menu item. You can always see if you are removing or adding the selected users by taking a look at the check mark next to the menu item.

You can specify the colors that the users who are in the *Special 1* category are to be displayed with in the data grid. Use the **Special 1 Background Color** and **Special 1 Text Color** in **Options | Colors** to specify colors.

Note that the **Users | Special 1 Users** menu item displays a check mark in the menu item itself

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when one or more of the selected users are already in the *Special 1* category.

7.5.3 Users | Special 2 Users

This menu item is exactly the same as the menu item **Users | Special 1 Users**, except of course that it toggles user membership of the *Special 2* category.

7.5.4 Users | Show All Users

Users | Show All Users causes OutBack to display all of the users in the data grid - including the *ignored* users.

7.5.5 Users | Show Normal

Users | Show Normal causes OutBack to display all users *except* the ones that have been marked as *ignored* (see **Users | Ignore Users**).

This is the normal *display mode* for OutBack.

7.5.6 Users | Show Ignored Users

Selecting this menu item results in OutBack displaying only the *ignored* users. See **Users | Ignore Users** for more information on how to mark users as *ignored*.

7.5.7 Users | Show Special 1 Users

Selecting this menu item results in OutBack displaying *only* the users who are in the *Special 1* category. See **Users | Special 1 Users** for more information on how to place users in the *Special 1* category.

7.5.8 Users | Show Special 2 Users

Selecting this menu item results in OutBack displaying *only* the users who are in the *Special 2* category. See **Users | Special 2 Users** for more information on how to place users in the *Special 2* category.

7.5.9 Users | Show Available Users

Using this menu item causes OutBack to display *only* the users who are currently available. In other words, only the users whose *available* and *online* symbols are displayed in the **Presence** column. A user can be available, i.e. not occupied with other tasks, although he or she is not logged on to a computer.

Available symbol

Online symbol

This *display mode* is dynamically updated as users change their OutBack status.

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7.5.10 Users | Show Selected Users

If you need to temporarily isolate a certain range of users in the data grid, this menu item may come in handy. Suppose you want to only see a list of users that have something in common, but this is not indicated in the columns in any way. Now select the users one by one, select this function, and the users will now be shown separately as if you had pre-selected a group. As soon as the users are shown in this way, you can perform different actions, e.g. perform a search.

Note that the **Esc** key will not return to the full *display mode* again. To leave this temporary list of users, you must select one of the other *display modes* (either using the menu or the buttons on the toolbar). As soon as you have left your list of selected users, you will no longer be able to return to it. In this case it is necessary to start over by selecting the users you want to see isolated, and then select the function again.

7.6 Alert Menu

All of the menu items under the **Alert** menu are related to the OutBack feature for setting ***alerts*** for one or more users. See Setting an 'Alert' for a User for more information.

7.6.1 Alert | Set Alert for Selected Users

This menu item is used to set an ***alert*** for one or more users. This means that for each user for whom you have set an ***alert*** you will receive a notification when the user changes his/her message or status.

To set an ***alert*** for one or more users you first select the relevant user(s) - see Selecting Rows and Columns. Then use the **Alert | Set Alert for Selected Users** menu item. While the ***alert*** is pending an unlit bulb symbol ( ) is displayed in the **Presence** column.

7.6.2 Alert | Remove Alert for Selected Users

This menu item is used to remove the ***alert*** status for one or more users. You would do this if you change your mind about wanting to be notified about a user's change of message or status. You also need to do this to simply remove the ***alert*** status for a user for whom the ***alert*** has been triggered.

Before using the menu item you need to select the users for whom it is to apply - see Selecting Rows and Columns.

7.6.3 Alert | Remove Alerts for All Users

This menu item simply removes the ***alert*** status for all users.

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7.7 Options Menu

The **Options** menu includes a large number of submenus that control many OutBack functions.

7.7.1 Options | On Startup

Options | On Startup | Clear Message on Startup

This menu item is used to ***activate*** or ***deactivate*** the setting **Clear Message on Startup**.

If this option is ***activated*** (as indicated by a check mark on the menu item) then the user's OutBack message is cleared when the OutBack Client program is started, typically when the computer is turned on. This is an option most users use, as most people will have a "Gone home" message or similar posted from the day before, and want to clear this message when they start work the next day.

If the same user is running several PCs with the OutBack Client program installed, then the user's message is *not* cleared when he/she starts the second PC on which OutBack is installed.

Options | On Startup | Hide OutBack on Startup

This menu item is used to ***activate*** or ***deactivate*** the setting **Hide OutBack on Startup**.

If this option is ***activated*** (as indicated by a check mark on the menu item) then the OutBack Client program will start as a "hidden" Windows program. This means that it does not take up any screen space, and its presence is not indicated by a button on the Windows taskbar. The only thing that indicates that OutBack is running is the small icon in the system notification area. You can double-click this icon to restore the OutBack window, or you can right-click it to show an OutBack menu.

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7.7.2 Options | On Log Off

This menu is used to choose which of three different operations is to be performed when the OutBack Client program is stopped. This is something that typically occurs only when Windows is shut down, as there should not be any reason to stop the OutBack Client program otherwise.

Menu items are used to choose which one of the three possible operations is to be performed, and the current selection is indicated by a check mark on the appropriate menu item. The three options are described below:

Options | On Log Off | Use Default Log Off Message

You should choose this option to post the same OutBack message most days when you go home. This automatic message will typically be one saying "Gone home", and with an associated return time of 8:30 AM, or whenever you normally arrive at work.

Note however, that the ***default log off message*** is only used when you have no current OutBack message posted. This implies that you should make sure you clear your OutBack message before you shut your PC down if you want to use the ***default log off message***. This also means that you can post a message like "Gone for the weekend" on Friday and then shut your PC down, knowing that this message will not be replaced by the ***default log off message***.

Options | On Log Off | Show Set New Message Dialog

You should choose this option if you want to be prompted to specify an OutBack message before the OutBack Client program terminates. This option is for people who can't use the same automatic message every day, but would like to be reminded about setting a message.

For example, if you come to work at different times on different weekdays then it would not be correct to use an automatic "Gone home" message, as that would indicate the same *return time* every day.

If you have dedicated a stored message in the **Set Message** dialog box to be a log off message, the dialog box will automatically select this message item in the list box and show a progress bar counting down from 3 seconds. If you don't touch the dialog box within this time period, OutBack will then automatically set the selected OutBack message.

Note that if you have dismissed the 3 seconds countdown and take more than 30 seconds to dismiss the dialog box, Windows will tell you that OutBack cannot be closed automatically. Just press the **Set Message** or **Close** button in the **Set Message** dialog box (you have to expand the dialog box first with **>>** in order to press the **Close** button). Windows will then resume the shut down sequence.

Options | On Log Off | Just Log Off

You should choose this option if you don't want to post an automatic message and you don't want to be prompted to enter a message. The OutBack Client program will simply terminate when it is stopped, and the current OutBack message (if any) will not be modified.

7.7.3 Options | On Received Notice

This menu is used to choose in which of three different window styles OutBack will display received ***notice*** messages. ***Notices*** are special messages sent by other OutBack users - see Sending a 'Notice' to one or more Users for more information about OutBack ***notices***.

Menu items are used to choose which one of the three possible window styles is used, and the current selection is indicated by a check mark on the appropriate menu item. The three options are:

- **Show as OutBack Window**

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- **Show as Top Window without Focus**
- **Show as Top Window with Focus**

These three menu items are described under Receiving OutBack Notices.

7.7.4 Options | Colors

This menu allows you to customize the appearance of your copy of OutBack so that it suits your tastes. The colors of all of the elements in the data grid can be specified via the various menu items of the **Options | Colors** menu.

Each color is specified via the standard Windows color choosing dialog box.

The various menu items of the **Options | Colors** menu are fairly self-explanatory. Here is a quick explanation of each one:

Options | Colors | Normal Background Color

This option sets the data grid background color for rows containing users who do not fall into any of the special categories mentioned below.

Options | Colors | Normal Text Color

This option sets the data grid text color for rows containing users who do not fall into any of the special categories mentioned below.

Options | Colors | Special 1 Background Color

This option sets the data grid background color for rows containing users who have been assigned to the Special 1 category.

Options | Colors | Special 1 Text Color

This option sets the data grid text color for rows containing users who have been assigned to the Special 1 category.

Options | Colors | Special 2 Background Color

This option sets the data grid background color for rows containing users who have been assigned to the Special 2 category.

Options | Colors | Special 2 Text Color

This option sets the data grid text color for rows containing users who have been assigned to the Special 2 category.

Options | Colors | Column Group Text Color

This option sets the color of the column header text indicating the ownership of the currently selected column group. Note that you can only see this in the **Show All Columns** view mode. Please refer to Managing Column Groups in the Data Grid for more information about this.

Options | Colors | Grid Line Color

This option sets the color of the grid lines. These lines are only visible if the **Options | View | Vertical Lines** and/or **Options | View | Horizontal Lines** menu items have been turned **On**.

Options | Colors | Move Column Line Color

This option sets the color of the line that is used to indicate where a column will be placed when you are moving a column with the mouse. See Rearranging the Columns for more information about how to move columns in the data grid.

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Options | Colors | Selected Background Color

This option sets the data grid background color for rows or columns that have been selected. See Selecting Rows and Columns for more information.

Options | Colors | Selected Text Color

This option sets the data grid text color for rows or columns that have been selected. See Selecting Rows and Columns for more information.

Options | Colors | Last Changed Message Background Color

This option sets the data grid background color for the rows that have been changed recently when the tracking feature is in effect. See Using the 'Tracking' Feature for more information.

Options | Colors | Last Changed Message Text Color

This option sets the data grid text color for the rows that have been changed recently when the tracking feature is in effect. See Using the 'Tracking' Feature for more information.

Options | Colors | Calendar Blocks Color

This option sets the color of the small blocks you see in the calendar column.

Options | Colors | Calendar Blocks Outline Color

This option sets the outline color of the calendar blocks you see in the calendar column, i.e. the small edge of the blocks.

Options | Colors | Time Line Color

This option sets the color of thin vertical time line in the calendar column that is used to indicate the current time.

7.7.5 Options | Tracking

This menu allows you to enable and control the OutBack ***tracking*** feature. See Using the 'Tracking' Feature for more information.

The **Options | Tracking** menu has two menu items:

- **Track Last Changed Messages**
- **Change Number**

7.7.6 Options | View

This menu is used to control the appearance of a couple of different elements in OutBack. Each of the menu items function as toggles; they can be used to either ***activate*** or ***deactivate*** the option, and they display the current status as a check mark on the menu item itself when it is ***activated***.

Options | View | Vertical Lines

This option controls whether or not vertical grid lines are displayed in the data grid. By not displaying the vertical grid lines you get a "cleaner" display and can actually display a tiny amount of additional data on the screen.

Options | View | Horizontal Lines

This option controls whether or not horizontal grid lines are displayed in the data grid. By not

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displaying the horizontal grid lines you get a "cleaner" display and can actually display a tiny amount of additional data on the screen.

7.7.7 Options | Sound

This menu is used to control the audio response of OutBack. Each of the menu items function as toggles; they can be used to either ***activate*** or ***deactivate*** the option, and they display the current status as a check mark on the menu item itself when it is ***activated***.

Options | Sound | Beep on Alert

When this option is ***activated***, OutBack makes a standard beep when an ***alert*** is triggered. This will alert you even when you are not looking at the screen or if your taskbar is hidden.

Options | Sound | Beep on Received Notice

When this option is ***activated***, OutBack makes a standard beep when a ***notice*** is received. This will alert you even when you are not looking at the screen or if your taskbar is hidden.

> The sound options may not be available when OutBack is running in a *Terminal Server* window or in a *Citrix* environment.

7.7.8 Options | Search

This menu is the setup section of the search functionality in OutBack.

Options | Search | Update Dynamically

Search *toolbar button*	**Activating** or **deactivating** this menu item will control whether the data grid will show the search result by merely pausing the search typing, or only after pressing **Enter** (or hitting the **Search** button on the dedicated toolbar).

Refer to Dynamic Updating of the Data Grid for more information about this.

Options | Search | Define Search Columns

Opens a dialog box where you can define which columns are dedicated as the actual ***search columns***. Please go to Search Columns for more information.

7.7.9 Options | Language

It is possible to change the language of the OutBack Client user interface. Open the submenu **Options | Language** and select the desired language.

As soon as you have selected another language, OutBack will tell you that it has to restart itself in order to utilize the new language.

7.7.10 Options | Shortcut Menu

This menu item is used to define which functions are present on the OutBack "shortcut menu". The shortcut menu is a menu that appears when you right-click somewhere in the data grid. (This kind of menu is also known as a "context sensitive" menu, but in OutBack the only "context" that supports right-clicking is the data grid.)

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All of the OutBack menus and menu items can be placed on the shortcut menu, including many that have nothing to do with the data grid.

You define which functions you want to be present on the shortcut menu by using **Options | Shortcut Menu**. The dialog box includes a short description of how it is to be used, and is thus fairly self-explanatory.

- The list on the left is simply a list of all of the OutBack menus and menu items.
- The list on the right shows the current contents of the shortcut menu.
- To copy a function from the list on the left to the list on the right you double-click on the item in the list on the left.
- To remove a function from the list on the right you simply double-click on it. Alternatively you can single-click on the item and then use the **Remove Item** button.
- To reorganize the items on the list on the right you can click on an item and then use the **Move Item Up** or **Move Item Down** buttons.

When you click on the **OK** button the shortcut menu will be redefined according to the list on the right of this dialog box (and the dialog box closes).

Note that while you can add as many shortcuts as you want, the shortcut menu is most efficient if you only add a few of the most commonly used menu items. As a general rule, 3-7 items are recommended.

Use of the shortcut menu is fairly straightforward. Simply click with the right mouse button anywhere in the data grid and then select the desired menu item from the pop-up menu that appears.

Some of the menu items may be dependent on the selection of rows in the data grid. For example, the **Send Notice** function sends a notice to the users whose rows in the data grid have been selected.

7.7.11 Options | Global OutBack Key

In order to make OutBack as easy and accessible as possible, we have included the option of a **global OutBack key**. This key will, when pressed, open the **Set Message** dialog box no matter what program is active in Windows. If you have associated a stored OutBack message with the global **OutBack** key, the dialog box will automatically select this message item in its list box and count down for 5 seconds. If you don't touch the dialog within these 5 seconds, e.g. to select another OutBack message, the dialog box will automatically select the default message and set it. In other words, you can press the global **OutBack** key and just leave your computer, knowing that OutBack will automatically set your most common message. The global **OutBack** key works as a toggle, i.e. it can both set and clear your message.

The actual key to be used as this global **OutBack** key can be defined in the dialog box that is opened with menu item **Options | Global OutBack Key**.

Use the mouse to click any of the three radio buttons in the dialog box:

- **Do not use any global OutBack key** - select this option when you're confident that you don't need a global hotkey or if you have a suspicion that it's incompatible with other Windows programs.
- **Use the default OutBack key "Pause"** - this is the default option and simply selects the **Pause** key (usually just above the **PageUp** key) as the global OutBack key.
- **Use alternative hotkey as the OutBack key** - use this option if you want to use anything else than the **Pause** key. When you have selected the option, single-click the edit box. Now press the key combination you wish to use, for example **Ctrl+Shift+D**.

NOTE that the dialog box will not double-check to see if the hotkey has already

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been used by OutBack or any other program. It is your own responsibility to ensure that you select a key that is truly available everywhere in Windows.

Please refer to Setting a Message via the Global OutBack Key for more information about the global OutBack key.

7.7.12 Options | Calendar Settings

The information in the ***calendar column*** is delivered by the OutBack Server, including the number of days you can read ahead in the column. The number of days that can be read ahead has been selected by the OutBack Server administrator and cannot be changed in the OutBack Client. You can change the time span for the days in the column. Just select the start time in the first drop-down box and the end time in the next. As soon as you press **OK**, the daily extracts of the ***calendar column*** will be adapted to show only the "busy" blocks between these hours of the day.

7.7.13 Options | Notes/Outlook Settings

If you are running either IBM Lotus Notes or Microsoft Outlook on your client computer, you can choose to integrate either of those programs in this dialog. Enabling the relevant program make menu items like **File | Open Calendar** accessible.

7.7.14 Options | Sort Definitions

The **Options | Sort Definitions** menu item is used to specify how OutBack sorts the data grid when you double-click one of the column headers.

The basic rule for sorting the data grid is that when you double-click on a column header then the entire data grid is sorted according to the data in that column. If you double-click on the same column header again then the data grid is sorted according to the data in that column again, but in the opposite order. This can also be used in relation to dates.

This is the basic rule for sorting the data grid, but in many situations this rule is not sufficient to obtain the results that you want. For example, what if you want to sort the data grid such that all of the employees in each department are grouped together, and within each department you want the employees listed in order of their telephone extension number. On top of that, if there are multiple rows where both the department name and telephone extension number are equal (for example if several employees share a telephone in the stock room), then you want these rows sorted by the employees' names.

Multiple-key sorting

If you have any experience with sorting information in database programs such as Microsoft Access, or perhaps even if you have sorted data in a large spreadsheet using a program such as Microsoft Excel, then you are probably familiar with the concept of *multiple-key* sorting. This concept allows you to specify that you first sort the data according to one column or key, which is called the *primary key*. For all of the rows that have the same value in the primary key, you then sort these particular rows according to a secondary column or key. The concept can be extended to any number of columns or keys, where each additional key is used for sorting only for the rows where all of the "higher-level" keys have data that is equal.

Merlinia OutBack implements *multiple-key* sorting through a concept called *sort definitions*, and the **Options | Sort Definitions** menu item is used to define these *sort definitions*.

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The "Edit Sort definitions" dialog box

When you select the **Options | Sort Definitions** menu item a dialog box will be displayed. This dialog box is used to add, edit and delete *sort definitions*. The dialog box is split into two parts. The upper part is where you select which columns you will have in one *sort definition*. You can have a maximum of 5 columns. In the lower part, you can see the already defined **sort definitions**.

Adding a sort definition

To add a new *sort definition* you perform the following steps:

1. Change the drop-down boxes in the upper part of the dialog box to the columns you want in your *sort definition*. The columns have to be in the order you want them sorted. Each column can only be used once. When you have selected a column in one drop-down box, it will disappear in the others so you can't select it twice.
2. Change the sort order (ascending or descending) for each column by clicking the radio buttons if needed.
3. Click the **Add** button.

Editing a sort definition

To edit a previously defined *sort definition* you do this:

1. Click on the *sort definition* in the list of existing sort definitions. This will copy the definition to the upper part of the dialog box.
2. Modify the columns and/or the radio buttons you want to change.
3. Click on the **Change** button.

Note that the **Change** button is the same button as the **Add** button. What the button does depends on which column you have selected in the first drop-down box. If you have selected a column that another *sort definition* also has as the first column, you will change that *sort definition*. If you have selected a column that is not used by any *sort definitions*, you will add a new *sort definition*.

Deleting a sort definition

Deleting a *sort definition* is very simple.

1. Click on the *sort definition* in the list of existing *sort definitions*.
2. Click on the **Remove** button.

7.7.15 Options | Message Logging

It is possible to log the usage of your messages, in case you would like to gather a list of them. In the **Set Message** dialog box, you can check this on for each message, you want to be logged. However, the logging itself has to be activated once and for all in the dialog box you open when choosing menu item **Options | Message Logging**. This is how the dialog box looks like:

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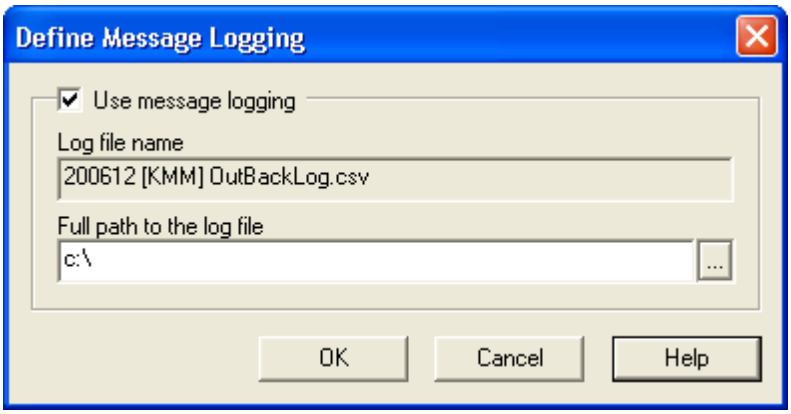

As soon as you tick the check box, you have activated the entire logging. The top gray box will tell you what the file name will be. For each new month, OutBack will create and write to a new file. Below is an edit box, where you can tell OutBack where you want the files to be placed on your hard disk. Type in a path or press the **...** button next to the edit box to browse for a suitable folder. As soon as you press the **OK** button the logging will be activated, but remember that you also have to tick a check box in the **Set Message** dialog box for those individual messages, you wish to log. See **Logging** in How the Elements of the 'Properties' Tab Work for more information about this.

> It is important to realize that logging is something that you control. No one is monitoring your use of OutBack, and you can always choose to clear the check box for individual messages - or even disable the entire logging completely by selecting the menu item mentioned above.

7.7.16 Options | Show All Columns

This menu item is also represented by a toolbar button on the main toolbar.

Selecting this menu item will show *all* columns available to OutBack, regardless of the active ***column group***. When active, the text color of the ***column group*** drop-down box will change, as will the column headers in the data grid that belong to this ***column group***. This way, you can see how the columns are associated with this group.

The **Show All Columns** *display mode* is usually the most logical mode to switch to whenever you want to manage the columns in your ***column groups***. Refer to Managing Column Groups in the Data Grid if you want to do it this way. However, it is easier to use the dedicated dialog box. See Managing Column Groups using the Dialog Box for more information about doing it this way.

You can change the color of the columns associated with the current ***column group*** with menu item **Options | Colors | Column Group Text Color**.

7.7.17 Options | Show Column Group

This menu item is also represented by a toolbar button on the main toolbar.

Select this menu item to show only the columns in the currently active ***column group***. If you leave the view in this *display mode*, changing to other ***column groups*** (using the dedicated drop-down toolbar box) will immediately show only the columns in that group.

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Refer to Column Groups for more information about ***column groups*** in general.

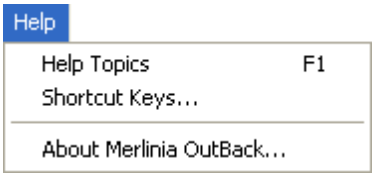
7.7.18 Options | Edit Column Groups

This menu item is also represented by a toolbar button on the main toolbar.

Select this menu item when you want to open a dialog box where you can create, rename or edit ***column groups***. See Managing Column Groups using the Dialog Box for more information about this.

7.8 Help Menu

The **Help** menu simply contains the standard menu items that most Windows programs include under this top-level menu.



Help | Help Topics

This menu item displays help information about the Merlinia OutBack Client program. This help information can also be invoked by pressing F1 at any time while running OutBack.

Help | Shortcut Keys

This menu item will show you a list of all the shortcut keys available in the Merlinia OutBack Client program.

This can help you use OutBack more efficiently. By learning only a few shortcut key combinations, you can reduce the time spent to set a new message to only a few seconds in most cases.

Help | About Merlinia OutBack

This menu item displays a dialog box with some information about the OutBack Client program. It will also show the exact location of the *OBConfig.ini* file, which is where OutBack stores your configuration. This may be helpful to the IT Department in case they ever have to troubleshoot a problem. If you delete this file, you will automatically reset your settings - should it ever be necessary.

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VIII Shortcut Keys

This is a list of all the keyboard shortcuts used in Merlinia OutBack. Memorizing a few of them can make life with OutBack a lot faster and easier.

Changing messages

Pause	This is the default global **OutBack** key, but it can be changed to something else if you want. (See Options | Global OutBack Key) for information about how to do that. The key works as a toggle and will set or clear your OutBack message, no matter what program is currently active in Windows.
Alt+*n*	Set the *n'th* hotkey. Up to 10 hotkeys can be assigned to OutBack messages; **Alt+0** to **Alt+9**.
F7	Show the **Set Message** dialog box.
Shift+F7	Open the **Set Message** dialog box and create a new message to be edited.
Ctrl+F7	Change other user's message. (This option is only available to *OutBack Administrators*).
F8	Clear your message.
Ctrl+F8	Clear other user's message. (This option is only available to *OutBack Administrators*).

Grid movement

Up Arrow	Move the selection one row up. If you go beyond the top row, you will wrap to the row in the bottom of the data grid.
Down Arrow	Move the selection one row down. If you go beyond the bottom row, you will wrap to the row in the top of the data grid.
Left Arrow	Move the entire data grid one column to the left.
Right Arrow	Move the entire data grid one column to the right.
PageUp	Move the selected row one page up. In contrast to the normal cursor movement, it does not wrap at the top row.
PageDn	Move the selected row one page down. In contrast to the normal cursor movement, it does not wrap at the bottom row.
Home	Move the data grid to show the first column on the left, i.e. the way it was when you started OutBack.
End	Move the data grid to show the last column on the right (normally outside the visible area).
Ctrl+PageUp or **Ctrl+Home**	Move the selection to the first row in the data grid.
Ctrl+PageDn or **Ctrl+End**	Move the selection to the last row in the data grid.
Esc	Deselects one or more selected columns. If no rows or columns are selected it resets the search functionality - i.e. the search field is cleared, the original data grid view mode restored, and all *search columns* set as active.
<Any letter>	As soon as you start typing - whether it being letters, numbers or even **Backspace** - you will immediately enter the search field, unless you have selected a control in the toolbar area that may itself accept letters - for example the **Shrink** check box

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	or the **Search method** drop-down box.

Searching

Ctrl+F	If no text is visible in the search field, hitting this shortcut key will enter the search field. If there *is* text in the search field, however, hitting this key will perform the search immediately.
F3	Find the next occurrence of the search text in the data grid and select its user row.
Shift+F3	Find the previous occurrence of the search text in the data grid and select its user row.
Ctrl+Tab	Browse to the next *search column*, indicated by an icon in the column headers (and by name in the status bar while holding **Ctrl**).
Ctrl+Shift+Tab	Browse to the previous *search column*.

Showing users

Ctrl+U	Show *all* users in the grid, even those that have been **Ignored**.
Ctrl+M	Show normal users in the grid, i.e. **Normal**, **Special 1**, and **Special 2** users.
Ctrl+I	Show only the **Ignored** users.
Ctrl+Q	Show only the **Special 1** users.
Ctrl+W	Show only the **Special 2** users.
Ctrl+L	Show only the online and available users, i.e. the users that only have the and icons set in the **Presence** column.
Ctrl+G	Show only the users you selected beforehand.

Managing alerts

Ctrl+T	Set ***alert*** for one or more selected users in the data grid. The ***alert*** will be indicated with an icon in the **Presence** column.
Ctrl+R	Remove ***alert*** from one or more selected users in the data grid.
Ctrl+Z	Remove all ***alerts*** from all users in the data grid, regardless of what you may have selected.

Miscellaneous

F1	Invoke the online help.
F4	Show the Microsoft Outlook or Lotus Notes calendar for the selected user rows in the data grid, if you have permission to do so.
Shift+F4	Show the Microsoft Outlook or Lotus Notes mailbox for the selected user rows in the data grid, if you have permission to do so.
F5	Reconnect to the OutBack Server.
Alt+F4	Close the window and minimize OutBack to the notification area, without closing the program.
F10 or **Alt**	Highlight the top-level menu so that you can use the cursor keys to browse its menu items.

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Ctrl+A	Select all the users in the data grid.
Ctrl+Shift+A	Select all the users in the data grid, including header column.
Ctrl+E	Send an e-mail (using your mail program) to one or more selected users in the data grid.
Ctrl+D	Send an SMS to one selected user in the data grid.
Ctrl+S	Show the **Send Notice** dialog box.
Ctrl+C	Copy the selected rows or columns to the clipboard. You can then use **Ctrl+V** to paste this information into another application, for example a text editor or Microsoft Excel.
Alt+Pause	If a telephone number has been placed on the clipboard, this key combination will dial the number. (Requires that OutBack is integrated with a PBX system).You have a few seconds to either cancel or change the number that will be dialed.

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IX Supported PBXs

Merlinia OutBack currently supports the following PBXs:

- Alcatel OmniPCX Enterprise (InfoCenter Link)
- Alcatel OmniPCX Office (TAPI)
- Avaya IP Office (TAPI)
- Samsung OfficeServ

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